

PHD

How can I improve my practice as a superintendent of schools and create my own living educational theory?

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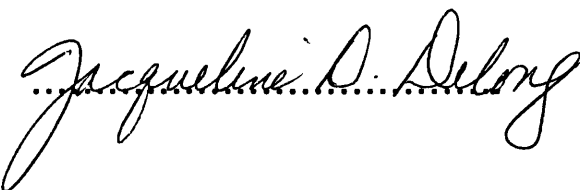
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How Can I Improve My Practice As A Superintendent of Schools and Create My Own Living Educational Theory?

Submitted by Jacqueline D. Delong
for the degree of PhD
of the University of Bath
2002

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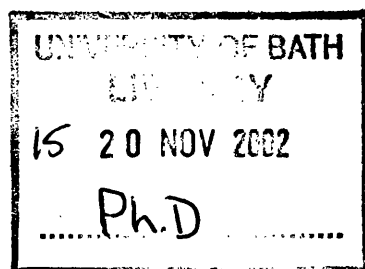
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Abstract

'How can I improve my practice as a superintendent of schools and create my own living educational theory?'

One of the basic tenets of my philosophy is that the development of a culture for improving learning rests upon supporting the knowledge-creating capacity in each individual in the system. Thus, I start with my own. This thesis sets out a claim to know my own learning in my educational inquiry, 'How can I improve my practice as a superintendent of schools?'

Out of this philosophy emerges my belief that the professional development of each teacher rests in their own knowledge-creating capacities as they examine their own practice in helping their students to improve their learning. In creating my own educational theory and supporting teachers in creating theirs, we engage with and use insights from the theories of others in the process of improving student learning.

The originality of the contribution of this thesis to the academic and professional knowledge-base of education is in the systematic way I transform my embodied educational values into educational standards of practice and judgement in the creation of my living educational theory. In the thesis I demonstrate how these values and standards can be used critically both to test the validity of my knowledge-claims and to be a powerful motivator in my living educational inquiry.

The values and standards are defined in terms of valuing the other in my professional practice, building a culture of inquiry, reflection and scholarship and creating knowledge.

Acknowledgements

The love of my parents and their passion for education has helped me to sustain my inquiries. My daughter, Shannon, my son, Dean, and my brothers, Edward and Stephen, have contributed to my sense of well-being. My friends have sustained me through days of pleasure and days of despair. Thank you.

The people who have contributed so much to my sustained commitment to this educational inquiry are acknowledged in my publications. I feel sure you know how much I have valued your company and help in moving on my inquiries. Ron Wideman, Jean McNiff and Linda Grant and my validation groups who encouraged me. Thank you.

As I complete this phase of my professional practice I am fortunate to work with wonderful colleagues in the Grand Erie District School Board. I am thinking of Peter Moffatt, my sustained support in work and research, and the Senior Administration Team, the Action Research leaders - Cheryl Black, Heather Knill-Griesser, Diane Morgan, James Ellsworth, Dave Abbey, Christine Stewart, Karen McDonald, Peter and Paula Rasokas. Thank you.

To the Masters Cohort (except those mentioned above), Brenda Christie, Marilyn Davis, Marion Dowds, Trudy Gath, Marion Kline, Mike McDonald, Bob Ogilvie, Phillip Sallesky, Janie Senko, Lindsay Stewart, Geoff Suderman-Gladwell, Julie White and Susan Drake and Michael Manley-Casimir who helped make a dream, a reality, thank you.

The living theory approach to educational action research allowed me to explore the dynamic quality of being an educational leader researching to improve her practice and Jack Whitehead believed I had knowledge to contribute. When I started, I couldn't use the internet: he taught me that. I couldn't conduct research: he taught me that. I couldn't use even "cut and paste" or use a video camera: he taught me that. I did not believe that my practical knowledge was 'real' knowledge and that I had something important to contribute to the academy: he taught me to believe. I needed a research method that was aligned with my philosophy and values and a supervisor who would stimulate my thinking and care about my work. I found one. Thank you, Jack.

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FRAMING THE THESIS

My thesis is positioned as an argument formed in response to respected theorists in the field of education who clearly want the same outcomes that I do – improved student learning through the support and sharing of the knowledge of practitioners. I believe that I am attaining that outcome. First, my passion and commitment for creating my own living educational theory (Whitehead, 1989, 1993, 1999) of my educational practices as a Superintendent of Schools can be understood as a response to hearing David Clark's invited address to AERA in 1997 on 'The Search for Authentic Educational Leadership: In the Universities and in the Schools':

The honest fact is that the total contribution of Division A of AERA to the development of the empirical and theoretical knowledge base of administration and policy development is so miniscule that if all of us had devoted our professional careers to teaching and service, we would hardly have been missed (Clark, 1997).

Clark went on to advocate for the importance of practitioners being encouraged to research their own knowledge base in order to contribute to the knowledge base of educational administration in the Academy. This thesis is a response to Clark's call for more practitioner-research by educational administrators.

Second, Catherine Snow's Presidential Address to AERA in 2001 on 'Knowing What We Know: Children, Teachers, Researchers', draws attention to the importance of developing procedures for systematizing practitioners' knowledge of education:

The challenge is to enhance the value of personal knowledge and personal experience for practice. Good teachers possess a wealth of knowledge about

teaching that cannot currently be drawn upon effectively in the preparation of novice teachers or in debates about practice. The challenge here is not to ignore or downplay this personal knowledge, but to elevate it. The knowledge resources of excellent teachers constitute a rich resource, but one that is largely untapped because we have no procedures for systematizing it. Systematizing would require procedures for accumulating such knowledge and making it public, for connecting it to bodies of knowledge established through other methods, and for vetting it for correctness and consistency. If we had agreed-upon procedures for transforming knowledge based on personal experiences of practice into 'public' knowledge, analogous to the way a researcher's private knowledge is made public through peer-review and publication, the advantages would be great. For one, such knowledge might help us avoid drawing far-reaching conclusions about instructional practices from experimental studies carried out in rarified settings. Such systematized knowledge would certainly enrich the research-based knowledge being increasingly introduced into teacher preparation programs. And having standards for the systematization of personal knowledge would provide a basis for rejecting personal anecdotes as a basis for either policy or practice (Snow, 2001, p.9).

My response to Catherine Snow's desire to systematize and provide "procedures for accumulating such knowledge and making it public, for connecting it to bodies of knowledge established through other methods, and for vetting it for correctness and consistency" is embodied in this thesis. It is a contribution to the necessary evidential base of research by practising administrator researchers as I conducted my own research on my practice as a superintendent and supported others to do the same in an emerging culture of inquiry, reflection and scholarship.

A third basis for my argument about the value of this research stems from the work of Susan Noffke (1997) as she argues that action research processes, and in particular, the "living educational theory", (Whitehead, 1989, 1993, 1999) do

not influence social justice, social theory and power relations. The results of my research and work go far beyond simply “personal transformation” and affect entire systems through policy and procedures implemented over long periods of time. This thesis provides evidence to demonstrate that committed individuals and groups researching their practice with questions like “How can I improve?” (Whitehead, 1989) are indeed capable “of addressing social issues in terms of the interconnections between personal identity and the claim of experiential knowledge, as well as power and privilege in society”(Dolby, 1995; Noffke, 1991) (p. 327).

In addition to the space created by these three researchers, my arguments have been instigated by the thinking of Ernest Boyer and Donald Schon. While Boyer (1990) saw that “Theory surely leads to practice. But practice also leads to theory. And teaching at its best shapes both research and practice”, my work takes his thinking one step beyond his new vision of scholarship which encompassed four separate but overlapping functions: discovery, integration, application and teaching (p.16). Donald Schon (1995) felt that Boyer’s new forms of scholarship would challenge epistemological, institutional and political issues in the university. He argued that the new scholarship “must imply a kind of action research with norms of its own which will conflict with the norms of technical rationality – the prevailing epistemology built into the research universities” (p.27). My *scholarship of inquiry* (Whitehead, 1999) takes Boyer’s thinking one step further and, as Schon (1995) predicted, “challenges” technical rational views of scholarship.

The process of systematizing my knowledge is focused on the transformation of my embodied values into educational standards of judgement that can be used to test the validity of my knowledge-claims. Professional educational values are embodied in what educators do. The meanings of these embodied values are transformed into my standards of practice as they are clarified in the course of their emergence in the practice of my educative relations (Whitehead, 1999). I am using Stenhouse’s

(1967) definition of *standard* – “criteria which lie behind consistent patterns of judgment of the quality and value of the work” (Kushner, 2001, p.70). The meanings which constitute the standards are carried through my stories and include value-laden statements. I am thinking of my values of:

- i) valuing the other in my professional practice;
- ii) building a culture of inquiry, reflection and scholarship;
- iii) creating knowledge.

Chapter One provides evidence to demonstrate that educational enquiries of the kind, "How can I improve?" (Whitehead, 1989) are indeed capable "of addressing social issues in terms of the interconnections between personal identity and the claim of experiential knowledge, as well as power and privilege in society" (Noffke, 1997). I begin with a narrative of the actual days of my life as a superintendent to communicate how I experience my practice in the context of exercising my 'system's influence'.

I share how explicitly economic rationalist policies have affected education in Ontario from the change in government in June 1996. I then examine the background and context of being a superintendent during the period of reorganization and amalgamation of school boards influenced by these policies. I explain the work of Executive Council and the elected trustees of the school board and describe and explain the policy development process. The analysis describes and explains my evolving knowledge base as a superintendent in relation to the restructuring of the board, changes in my portfolios, and radical changes in the curriculum and assessment policies and procedures.

Chapter Two explains how my embodied values, which are the standards of practice and judgment for which I hold myself accountable, can be used as standards of practice and judgment for testing the validity of the knowledge-base of my educational leadership. The first part of Chapter Two presents two studies of

singularity (Bassey, 1995) with Greg, a principal, and a teacher, Cheryl. These studies connect my value and standard of practice of valuing the other in professional practice to my sustained support for a relational form of educational leadership that explores possibilities for democratic and non-hierarchical systems in the context of extending my educative influence.

The second part of Chapter Two is a story of my family of schools' principals and vice-principals, a view of our learning together, my relationship with two principals, Kim and Greg, and with a parent and a teacher. I demonstrate that the learning and the relationships are created and sustained out of the dialogic processes that are natural and indeed crucial for my ontology. Most significantly for my thesis I demonstrate how, through the recounting of the stories, their construction and deconstruction, the meanings of my embodied values are clarified in the course of their emergence in practice. This process of clarification transforms my experience of my embodied values into publicly communicable standards of judgement to which I hold myself to account in the sense of testing the validity^{*} of my claims to educational knowledge.

Chapter Three explains my influence in helping to build a culture of inquiry, reflection and scholarship within a District School Board. Because of the importance of the connections between the personal and the professional in my thesis I again start with the people and then go to the tasks in my system portfolios. When I speak of my system portfolios, I mean those roles in my job description that affect the entire school district, not just my family of schools. Because of their higher profile, they are the ones on which the system judges my performance. The first part of Chapter Three is focused on my system portfolios of Career Education and Assessment, Community Relations and Communications. My analysis is focused on how I mobilize systems to support people and the transferability of that knowledge.

^{*}The Validation Group process is described on p. 316. It is a rigorous critique of my research at significant stages in its development which informed changes and next steps.

The second part of Chapter Three analyses how I have managed to provide sustaining support for inquiry, reflection and scholarship as a systems manager. It focuses in particular on my influence on the development of a culture of inquiry and reflection as I mobilize system supports and then create sustained supports through contributing to building communities and networks. The *systematized knowledge* that Catherine Snow (2001) is searching for already exists in my board. I begin with my initiation into action research, the beginning years in Brant, the supports that I built up to provide sustained support for the teachers and principals in my district and as an additional benefit in other districts.

Chapter Four connects my learning from experience, the creation of my embodied knowing as a leader, my integration of ideas from the literature on leadership and my support for individuals to develop their capacities as I discover and manage resources to support visions of an improved educational system. I conclude by emphasizing the importance of my knowledge-creation in my professional practice as a Superintendent of Schools and by asking and answering the question: Why is there no simple or even complex answer to “what is educational leadership?”

Chapter Five is my methodology^{*} of meaning making. I walk through the way in which I have made meaning out of the data archive that I have collected, analyzed and validated over the six years that I have been a superintendent. In my usual dialectical and dialogical ways, I ask and answer the questions: Why did I choose the action research process? How do I represent my claims to know? How will I validate my claims to know? and What approaches did I use to conduct my research? I will explain how my mode of inquiry has been influenced by a living educational theory approach to action research (Whitehead, 1989, 1993, 1999). By this I mean that the story of my research is a first person inquiry into my own learning and knowledge-creation between 1996-2002 in a Ph.D. program as I ask, research and answer the question, “How can I improve my practice?”

^{*} My methodology is located in pp 268-318 so that the reader can start in the practical world of the life of a superintendent; if the reader wishes first to know the method of my research, go to Ch. 5 and then Ch. 1.

My theorizing emerges naturally from the narratives of my life as a superintendent in a self-critical process of judging my work in terms of its coherence within my values as standards of practice and judgment and from public accountability by sharing my stories. The assessments and evaluations of friends and family, professional colleagues and practitioner and academic researchers have informed my practice and theory.

As I was researching my life and writing my thesis, the metaphor of a wave emerged from my thinking. This metaphor helped me frame my theorizing.



Winter Breaker by Ken Bolt, 1991,
Studio Proof 1/1, a gift from a friend
on my appointment as superintendent,
December 1, 1999.

The image is of a mammoth wave in a painting above my fireplace in my living room. I am swept up by its power, its beauty and its visible possibilities and potential. There is a spirituality within it that inspires and lifts me. As with the wave, my thesis has rolled and crashed and folded back on itself many times over and carries ideas forth and then back in a steady rhythm of creation. As with the other photos in the thesis, it carries deep, varied and complex meanings for me.

The Appendices contain examples from my data archive of papers, published writing, board reports, policies and procedures, organizational charts and performance reviews.

I hope that you find this an enjoyable and elegant story of a productive life full of life-affirming energy (Bataille, 1962; Whitehead, 1999). I have enjoyed my part of the process.

Chapter One

UNDERSTANDING THE PERSONAL, PROFESSIONAL, ECONOMIC, AND POLITICAL CONTEXT

In this chapter I describe and explain the work of being a superintendent, a senior manager in my personal, professional, economic and political context. It provides evidence to demonstrate that educational inquiries of the kind, "How can I improve?" are indeed capable "of addressing social issues" (Noffke, 1997). I begin with a narrative of the actual days of my life as a superintendent to communicate how I experience my practice in the context of exercising my 'system's influence'. The chapter continues with examining how explicitly economic rationalist policies have affected education in Ontario from the change in government in June 1996. I then examine the background and context of being a superintendent during the period of reorganization and amalgamation of school boards influenced by these policies. I explain the work of Executive Council and the elected trustees of the school board and describe and explain the policy development process. The analysis describes and explains my evolving knowledge base as a superintendent in relation to the restructuring of the board, changes in my portfolios, and radical changes in the curriculum and assessment policies and procedures.

How can I help you get close to the lived experience?

By trying to communicate the flow, the context, the events as they unfold and as I perceive them, I hope to give you insight into lived experience. Practitioner research is messy and communicating it, a challenge. Tina Cook (1998) tries to define this mess as "a flickering" and "a zig-zag path":

So is 'mess' a flickering between the suspected and the known through a talking and thinking period around the data gathered that allows

germane questions to materialize? Is the 'mess' how we access our 'tacit knowledge' (Polanyi, 1962)...Is 'mess' the process of following this zig-zag path of crossing from the intuitive to analytical mode of thinking and back that helps identify pertinent knowledge? (p. 103).

While no one can live another's life, I want to share with you as well as I can what it is to live, to be, this thing called superintendent. 'Getting close' is as much as I think I can expect. I have traced events, my thinking and feelings during a week in June, 2000 and connected them through footnotes to other parts of the thesis. I have used **comic font** for reflection on the narrative during the writing of the thesis.

What is a typical week in my life as superintendent?

'Typical' is a word I use with some trepidation because there is no such thing as *typical* in any of my days, given that they never repeat themselves. I use the word lightly to signify that this week could be construed to be as erratic, unpredictable and interesting as any other.

Monday, June 12, 2000

At 7:30 a.m., I drove to the Simcoe School Support Centre (the field office for which I am responsible about thirty-five minutes from my house) for an 8:30 a.m. meeting with secondary school principals to design a plan for Magnet Programs for the entire Grand Erie Board. To review the situation to date, Magnet programs are specialized, often high-cost, secondary school programs not necessarily available in every school but accessible for those students who wish to transfer. This had been an add-on to my portfolio (there is no reference to it in my goal package 1999-2000 but it is in my list of responsibilities for January, 2000) as a result of the fact that another superintendent had retired and the job still needed to be done. In fact, a plan for Magnet programs had been in the developmental process for at least three years. What had started as a model in the former Brant board now had become increasingly complex because of the

distances between schools and the number of small schools in the new board. The secondary school principals had met on their own as a group and determined a definition of Magnets and some assumptions. Peter Moffatt had given me a nudge to complete the plan in the Executive Council meeting on May 17. I held a first meeting with all secondary principals on May 22. The meeting went very well and I thought we were coming to consensus on assumptions when it came to a standstill over the issue of equity. Knowing the implications of a decision to provide access to all students, involving exorbitant transportation costs and recognizing the significance of equity issues, I had drawn the meeting to a conclusion and wondered what I would do next.

I tried to figure out how I could get some consensus by secondary principals and decided that I needed to get conversations in smaller groups and closer to the schools. I drafted a report for Executive Council for May 31 proposing meetings by area of the board so that I might break down the issues in relation to current transportation patterns. I proposed as well a commitment to allocate a large sum of money to the expansion of Magnet programs out of the Educational Change Fund and the assignment of a support staff person to assist me in the development of the Magnet Program Plan (MPP). The first was approved; the second was not; for the third it was suggested that I look for a secondary administrator who might like the experience. I would have to apply for funding to the Educational Change Fund and the proposal would have to take its chances with all of the other proposals. While not my first choice, I felt that there would be enough support in the Planning Council (which includes Executive Council and a principal representative from each family of schools) to get some, if not all, of the \$100,000 in the proposal. I set up a series of meetings by area of the board and sent out a memo to the principals. Also I thought about who I might engage in the process and decided to invite a secondary vice-principal who had been rejected in the last round of appointments as not being ready, about which I felt some regret and who I saw as having potential. I saw this as an opportunity to work with Ross and to let him know that I saw his capacity to be a

principal. I explained the task and the time commitment over the next six months and he agreed.

Now to the meeting. I chaired the first meeting with the two families of schools in the area by setting the parameters and by using the work of the May 22 as the basis for dialogue. We went through each part of the report and modified it to the satisfaction of the group. Each principal identified the Magnet Programs for his/her schools and those that would require additional funding. Having set a process in place for the series of meetings, I asked Ross if he wanted to chair the next meeting and based on my notes from the meeting sent him the amendments for use in the next meeting the next day. On the way driving back, I passed one of the principals who was late for the meeting. We stopped on the highway and I caught her up on the meeting and she gave me her input.

By 11:00 a.m. I had driven back to the head office in Brantford to catch up on my e-mail, voice and paper mail. I made several phone calls, including one to Ross, talked with my administrative assistant about a variety of tasks to catch up on pressing issues and with Maria Birkett¹ about an updated description of leadership programs for my performance review with Peter Moffatt the next day and started to pull together a package for that meeting. Several phone calls and e-mails focused on the board reports that I was responsible for that evening at the committee of the whole board meeting and I completed some mail that required signatures such as field trip and budget requests.

At 12:00 I left the office to pick up Jack Whitehead (who was in Brantford to teach the Brock masters program² and was accompanying me because we had a subsequent meeting with Linda Grant³, Ontario College of Teachers (OCT) Manager of Standards, on OCT Standards of Practice) to drive to a meeting at the Hamilton-Wentworth District School Board at 1:30 p.m. This meeting was the fourth meeting to design a

¹ See Chapter 4.

² See Chapter 3B.

³ See Chapter 3B and 5.

new Principals' Qualifications Program (PQP). Even as I write this I am imagining the environment and faces of the people and I can feel the tension and anger that I felt in the meeting. Wayne Cross, Superintendent from the District School Board of Niagara (DSBN), and I had first talked about working together as partners to improve the training that our aspiring leaders received in the PQP. The model I had in mind would take the School Leadership Program that I had designed and integrate it into the Brock University PQP with part of the program on site in the board and part as a common program to be held in a central location for both of our boards. One of my purposes in this and other programs like the masters cohort partnership⁴ in addition to making the programs more relevant and meaningful is to remove barriers to participation such as driving time and distance. At the same time that Michael Manley-Casimir, Susan Drake and I were bringing the masters program to fruition, I was talking to Michael about this PQP partnership. In May, 1999, Michael, Wayne Cross and I met with the PQP staff at Brock University to explore the idea. There was much resistance to change from the staff but the appearance of some agreement. The lead staff person at Brock would apply for our new program. Just to follow this story to its conclusion, I will continue...

It is at this time that we bring Nora Campbell who was a new superintendent with the leadership portfolio in the Hamilton-Wentworth District School Board into the partnership. We expect that the new program will be offered in September, 1999. To my surprise one day in early June I hear that the Ontario College of Teachers (OCT) has turned down the application because it has not been informed of the change in the program and has, in fact, heard about it in the Hamilton newspaper from a speech that Peter Moffatt, Director of Education, has given about the variety of partnerships that have been developed in the board

I spend considerable time over the next few weeks and months trying to sort out where we had gone wrong. From colleagues at OCT I discern

⁴ See Chapter 3B.

that the process for approval has not been followed and that the College will not approve on site programs that are unique to a particular board. However, I also find out from Ron Wideman⁵ and from a Superintendent from the Simcoe County District School Board that what I had in mind was already happening in their board in partnership with Nipissing University. In the fall Nora, Wayne and I have a meeting with Doug Wilson from OCT who is responsible for the design of the new PQP programs and he tells us that what we have in mind is feasible if we follow the new guidelines for a PQP provider. I am by this time tiring of the effort required to get the staff at Brock to envisage a change in program. I have many other projects that need my attention and that are less frustrating. In essence I put it on the back burner for six months. I just needed to regroup and look for another door to allow this to happen. **This is an example of my use of the 'parking lot'⁶ and of the way I try every avenue to get a project to work and then accept that there is still a way but I need time to find another route.**

In February, Wayne Cross e-mailed me to see if I wanted to try again. If he has the strength to try again, so do I. Nora and Wayne and I meet alone to plan a strategy. We will propose a consortium of the three public boards and area Catholic boards and Brock University. Michael likes this idea. We meet in the District School Board of Niagara in May with Michael, two of his staff and the partner boards and Eden, an electronic distribution system to provide an on-line component for the course. While there is considerable interest, the Brock staff resist the idea of on-line. I can't understand this since other PQP programs are already doing it. It is not new! Subsequent to the meeting Michael feels that Brock has the technology to provide an on-line component.

⁵ See Chapter 3B.

⁶ See Chapter 5.

Now back to the meeting. The meeting is what I call a 'yes, but' meeting with a contingent of four men without energy or passion except for holding onto their power and the past. I knew very early in the meeting that my decision would be to refuse to meet again with them. In e-mails and conversations with Nora, Wayne and Michael, I said just that. Over the summer I hope that Michael is able to solve the problem of recalcitrant staff and we, the partners, can meet late in September.

After the meeting, Jack and I had arranged to meet with Linda Grant to catch up on our lives and to dialogue on the state of the world on the teacher testing and Linda's new document to the government with Ontario College of Teachers' recommendations. We share concerns about the group of resistors in the prior meeting most of whom she knew and about the need for change. Then we drove back home, a quick dinner and I was off to the Board meeting. I arrived in time to talk with one superintendent about replacing a principal-leader position and what might be some possible solutions, with another about a teacher termination (one that I've been working on for five years), to complete my file for my performance review next day and to gather files for processing during the meeting.



Julie White, a classroom teacher whom I have known since 1999, is presenting to the Grand Erie District School Board meeting on her action research project, "How can I improve the writing skills of my Grade 4 students?" June 19, 2000.

I arrived in the boardroom to connect with the staff making presentations, reassure them and then skim the reports so that I could make the introduction to the presentations and reports. The board meeting began with a presentation

from Diane Morgan⁷, James Ellsworth⁸, Julie White⁹ and Margaret Juneja on the process and results of the Action Research project using Education Quality and Accountability Office (EQAO) test results (Wideman et. al.,

⁷ See Chapter 3A.

⁸ See Chapter 3A.

⁹ See later in this chapter and Endpiece.

2000). Diane and James gave the background and process and the teachers, Julie and Margaret, were eloquent in their descriptions of their learning and the improvement of learning for students. Afterward they both volunteered for another project next year. **Those who say that no one will do action research because it is too much work, should talk to these two. Work, yes; worth it, yes; too much, no.**

The next item was the report, policies and procedures for Work Experience including Co-operative Education, Ontario Youth Apprenticeship Program and short-term job training. When policies come to the board they have been through an arduous journey spanning many months and in this case, even years. This policy had been reviewed many times with James Ellsworth and Elaine MacAskill in the Brant Board and Diane Morgan and James in the Grand Erie Board. We now had policies and procedures close to being in place in the new board. As follow-up to the presentation earlier in the meeting, then James and I reported on progress in the implementation of the action plans for the EQAO test results.¹ As I articulated to the trustees, this was part of our intent to be accountable to our community.

Later in the meeting Executive Council also shared with the trustees the difficult position we were in with regard to a two and a half million dollar over-expenditure in the draft budget in the teacher and secretary lines because of the costs of small schools. The next meeting would include a list of possible areas for budget-cutting in which they would have to make some difficult choices. The trustees are really struggling with the loss of discretionary power to deal with local needs because of the funding formula which does not allow them to make decisions according to what they value. This is a dramatic change that their dialogue clearly articulates.²

At 10:00 p.m., after the board meeting, I phoned the principals and vice-principals whose appointments had been confirmed by the board in camera. I drove home feeling very pleased to have submitted concrete evidence of the progress that I had made in

¹ See pp. 460-463 of the Appendices.

² See the next section of this chapter.

enhancing the capacity of the system to improve the quality of student learning through inquiry and reflection and absolutely euphoric from the image of the teachers voicing their learning and knowledge. I arrived at home at 11:00 p.m. to e-mail Jack (my journal), check my planner and prepare my clothes for the next day.

How do I make that switch from outrage and anger in the afternoon meeting to the pure joy from the board meeting? Part of the answer lies in seeing progress towards a vision of a better school system with improved student learning and part in the enjoyment I get from the quality of the relationships. No matter what I'm doing I have that vision and where blocks occur, I analyze what they are and how they can be overcome. In the case of the PQP, after many setbacks in accomplishing the vision, I had come to the conclusion that the group of four was a block that I had to remove in order to proceed. Since that was not in my direct power, I have simply eradicated them from my image of the future and expect Michael to solve it in the next three months. Otherwise, I will go to 'Plan B' which is another partner that I have held in abeyance hoping for change in this group dynamic. I always have a Plan B and frequently C and D. **Seeing no signs of intent to act by Brock staff, I bring Plan B to life in a partnership with the Ontario Principals' Council to bring the PQP to Brantford in July, 2001.**

In addition to a capacity to nurture and care for people, like Gilligan's (1982), "visions of maturity", I feel strongly the responsibility I have to make things better. I do have that ruthless side that I find necessary to use quite infrequently. However, I am prepared to make those hard decisions in order to get to a better future. I think that capacity to switch is one of the capacities that has sustained my commitment and enjoyment over these six years so that despite the frustrations, setbacks and crises, I never lose sight of the greater good and my responsibility to create a better future.

Tuesday, June 13, 2000

I start Tuesday morning in the Education Centre (Head Office) in Brantford at 8:15 a.m. responding to e-mails and phone calls, checking on items for the Family of Schools' meeting agenda on Friday, requesting that Sue, my administrative assistant, set up a spreadsheet of the Magnet programs and finalizing the proposal for the \$100,000 from the Educational Change Fund. When I arrive at Peter Moffatt's office with a file of some of the reports on leadership programs and the minutes from the Magnet programs, he is talking to a parent from one of my schools. I have been encouraging the principal and vice-principal of this school to work with the parent. The issue is one of bullying but it is much more complex than that and Peter gives me his notes and asks me where I think the problem lies. I tell him that it is a combination of an anxious parent who works long hours out of town, historical distrust of the principal, poor social skills on the part of the child and some miscommunication on both sides. He asks me to follow up with a meeting, if necessary.

From 9:15 a.m. to 1:15 p.m. we review my performance over the year going through my goal package and the additions in January because of superintendent retirement. I share with him the results of the evaluation from my family of schools and from James Ellsworth and Maria Birkett. The evaluation from the family of schools is a remarkable improvement from last year. I remember how upset I was last year at the negative comments about my performance and Peter's comment that this was not the one to worry about. He said that if the next one, after two years, was negative then I would have something to worry about. He was right. We reflect on the trials and accomplishments and begin the planning for the next year. While he is clearly pleased with my performance, he says that one of the superintendents feels that I dismiss him. I agree that I have moved on from my earlier anger and arrived at the rationalization that I feel that he is not pulling his weight and is undermining the formation of an effective team. Peter reminds me that that is his problem. I agree. We chuckle together

that the last goal that has been on my goal package for all five years, *to find the meaning of balance* (DeLong, 1995-2001), has still not been attained.

From 1:45-3:20 p.m. I attend the Magnet Program Plan meeting at Pauline Johnson Collegiate Vocational School (PJ). I have a feeling of real comfort in PJ because of my initial teaching experience there and also because of my first three years as superintendent in that family of schools. Ross chairs the meeting and we continue the work on the definition and assumptions. I feel that we are making real progress through the smaller groups, a commitment through involvement and some excellent suggestions for implementation when the report is done. One more meeting to go and then report to Executive Council on June 28.

The final meeting of the day at 3:30 p.m. is a tough one. A teacher, not in my current family of schools but whom I know from my former PJ family, has been reported to be cheating on the grade three Education Quality and Accountability Office (EQAO) provincial test by a parent. I have reported the incident to the director at EQAO and she has asked that I (as superintendent responsible for the provincial testing) discipline the teacher and they will pull the school booklets for review. I also discussed possible discipline with the superintendent of human resources and indicated that I would hear the teacher's story before deciding on the course of action.

The teacher, the federation president, the new principal and vice-principal attend the meeting and I begin by reviewing why I am there and then I ask the teacher to tell me what happened. She tells me that she did help the children with the test but that it was minor help and she felt that it was O.K. because of the attitude to the test of the staff, the area consultant and former principal. In the course of the conversation with my questioning she confessed that what she did was wrong and that she had not covered the curriculum to prepare the children for the test. I reminded her that we did not have a choice about whether we liked the test or not and if the test violated her values, she would have to live with that for five half days a year or find another line of work. Further I said that she had a problem with her teaching skills in mathematics and asked

her about what she intended to do about it. She committed to bringing me a plan for the next year to improve her pedagogy and promised not to repeat her behaviour on the test administration again. I said that I had still to decide what discipline would follow. She thanked me for my understanding and my handling of the situation. **Evidence here of my valuing the other even in difficult circumstances.**

After she and the federation president left, I talked with the principal and vice-principal about the larger problem of staff attitude to the test and teaching the curriculum. The principal asked me if I would talk to the staff about expectations with regard to the test and the curriculum and I said I would if the superintendent of the family agreed. As follow up the next day I consulted with the family of schools superintendent about the meeting with the staff, the human resources superintendent about the discipline and the curriculum superintendent about the deviation from the curriculum and the role of the consultant.

Wednesday, June 14, 2000

Again I arrive early and try to get some phone calls and e-mails done before 8:30 a.m. when Executive Council¹² starts. It is a full agenda which includes a review of the board meeting agenda, new policies and procedures, new principal and vice-principal appointments with recommendations from School Councils, reports from several initiatives including Volunteer Development, one of my areas, an update on technology infusion and the creation of a list of discretionary areas for cutting from the budget for trustee decisions. I return to my office to confirm my meeting with the staff where the EQAO test problems occurred, add two more items to the family of schools meeting and follow up on items from the Executive Council meeting.

I drive thirty-five minutes to the Simcoe Office for an interview at 2:30 p.m. to select a new consultant for the field office. The team consists of the principal-leader, a principal from the area and me. We amended the proposed questions, reviewed the

¹² See later in this chapter.

process to ensure consistency and interviewed five candidates. The first four interviews were rather uninteresting and I began to worry about finding the right person. The decision was obvious with the last candidate, Lynn Abbey¹³. It was one of those occasions when you feel everything is right with the world. All three of us felt the energy, the commitment to children and learning and the passion for making a difference that just flowed from her. Not only did she know the content answers, she drew you into her world of relationships and the sheer joy of learning. No checklist from the College of Teachers could capture the “life-affirming energy” (Whitehead, 1999; Bataille, 1962) that Lynn brings to her world. I felt simply euphoric when I left the centre and it stayed with me for several days. This is an area of my influence (as well as power and privilege in society (Noffke, 1997) in my ability to hire people who share that passion and commitment to improving student learning and making a better school system. However, my enjoyment of this decision is tempered by the fact that the decision is not complete because we have collective agreement restrictions as to whether the person is an elementary or secondary teacher. The appointment is on hold pending another interview process. With a little massaging of the politics, Lynn was hired and has been “addressing social issues” (Noffke, 1997).

That evening I went to visit a friend who has cancer and who is living through chemotherapy treatments. We have been friends for at least 20 years but she has been living out of province and just returned a year ago. Our children are close to the same age and when they were younger we would visit as families. She is very intelligent and creative and fun to be with. Even with the trauma of her life she is very good company and we laugh a lot and plan for the future.

When I arrived home, I called the parent (referred from Peter Moffatt) who was upset but he was not home.

¹³ See Chapter 3B.

Thursday, June 15, 2000

Thursday is an unusual day because I am taking one of my holidays to work on my thesis. **Superintendents have personal contracts with a specified number of days of holidays, not aligned with teacher holidays.** It is a real gift to have Jack actually present and not just virtually present through the e-mail which is my normal opportunity to get response to my writing and thinking. The thesis is starting to come together and it is an exciting time to share his experience with the master's students and their progress and relate that to my own learning. I write; we talk. It works well for me. **Because of my dialogic and dialectical way of learning and processing.**¹⁴ I am feeling the pressure of wanting to get my knowledge written and published and to use the time I have taken from work effectively. However, time at home is not time away from work. I talk to Sue about plans for the next day and any issues that have occurred. Since the principal is away with the students on an overnight school trip, I talk to the vice-principal at the school where the parent is upset and get an update. I make some suggestions and he follows up. I try again to get hold of the parent. Again, not at home. I respond to my e-mails and phone calls.

At 5:00 p.m., I attended the retirement social of one of the secondary principals in my family of schools even though I was on holiday. He was clearly very happy to retire early having commuted his pension.

Friday, June 16, 2000

Besides Magnet Programs, in January Peter had added Communications to my portfolio with the expectation that some other areas would go off. So far that hasn't happened. Anyway, I began Friday morning with the staff at the marketing firm that we have hired to improve the communications within the board and with external

¹⁴ See Chapter 5.

groups. Our agenda included a review of the workshop they ran with the administrators a week earlier, an update on interviews with staff, a media meeting on the board budget and the plan for a series of workshops on communications skills for trustees, senior administration, school administrators and senior managers. In the review of the previous week's workshop the evaluations indicated that there was room for improvement. Some good things happened but the session had gone overtime and as I pointed out the administrators did not feel they needed to stay to listen to their colleagues report from the sessions because the project manager, had told them that the feedback would be sent out by e-mail.

With the evaluations in mind and from the information the consultant was receiving from his interviews with principals, superintendents and trustees, it appeared that everyone thought it was the other person's problem, not theirs. So the plan for the next workshops in June and the series in August was that we needed to raise their awareness of the issues surrounding communication. We needed to encourage the expectation that everyone had room to grow in communications skills and that each individual was the answer to improved relationships, not the marketing firm's quick fix. A plan evolved for the June 26 session with the superintendents and trustees and for the series of workshops on communications skills for August. I learn about communications and marketing from them and they learn about the system, the culture and giving workshops from me in these sessions.¹⁵ It is exciting for me to learn a new field of knowledge and to start a new project. I keep asking 'How am I assessing my effectiveness to enhance the quality of student and staff learning?'

At 11:00 a.m. I headed off to pick up Jack and get to the Simcoe Office by 12:00 to meet with Keith Quigg, one of the principals in my family, to work on his performance review using his action research project on his learning about his values and board policies and procedures. In the meeting he talked about critical points in his learning:

¹⁵ See Chapter 3A.

1. Nov. 23, 1999 at Program Council when he heard me say that the Special Education Model that had been presented did not fit my image of special education,
2. The plan by Jim Grant to move computers from labs to classrooms and
3. The presentation by Peter Moffatt at the Administrative Retreat in April in which he talked about the role of policies to free people up to do creative things for students not to block or restrict creativity.

This last was a critical incident for Keith in terms of changing his perspective on the role of policy. Its importance lay not just in his becoming part of the new board but also in his own Ph.D. research. I still had concerns that he wanted simple answers to complex problems but I could see growth in his understanding of the system. He had identified his area for growth and made a commitment to it by becoming more reflective. This would be the first principal performance review in my new family using the action research process (DeLong & Quigg, 2000).

At 1:00 p.m., the Family of Schools' meeting began with the secondary principals followed by the meeting with both elementary and secondary in which one of the vice-principals, Bonnie Church¹⁶, shared her action research project on how she had improved communication in her school using the internal e-mail (Church, 2000). I had set up the video camera for the following presentations of Jack and I and with her agreement taped her presentation and gave her a copy. Having a peer share her learning was a perfect way to move the administrators to the next step from the work I had started the month earlier. In May I had asked them to identify one area of their school plan for 2000-2001 on which to focus some research as to their effectiveness. In this session Jack worked with them to form a question for investigation. The ones that they reported were "I" or "We" questions focused on things that mattered to them in their schools. I asked them to e-mail their questions to me for sharing in the group. It was very affirming to have them engaged in the process of assessing their effectiveness. **Building the culture of inquiry, reflection and scholarship is embedded in most of my work.**

¹⁶ See Chapter 2B.

In the rest of the session, we covered agenda items that included planning for next years' meetings, the formation of a committee to plan the Professional Development component of the monthly meeting, discussion around a new format for involving principals and vice-principals in superintendent portfolio advisory committees and a review of the evaluation they had done on my performance. In the videotape of the session you can see me appreciating the affirmation of a very positive evaluation from them which Keith Quigg had collated and handed out which showed improvement over the year earlier (Quigg, 2000). You can also see me dealing delicately with one vice-principal's remarks that I didn't care enough about vice-principals. I spent some time explaining that it wasn't a matter of caring but of time and of the fact that I was the supervisor of principals but the principals were their supervisors and I hoped mentors for the vice-principals. I used the example of the one school council that asked me to meet with them twice a month. It was great to know that they would like to spend that time with me but I pointed out that it was just not possible with the size of the job to be done and that they should work with their principal for the benefit of their school. After the meeting, the group went to Keith's for a year-end social.

In this week I was evaluated by the director as well as the administrators in my family while I reviewed the performance of a principal, provided direction to a teacher on her performance and wrote a letter of termination on another that I had had on review for five years. That commitment to accountability I also demonstrated for the trustees in the public presentations of the teaching and consultative staff as they ask and answer the questions to assess our effectiveness to enhance the quality of learning in the Grand Erie District School Board. I see a developing culture of inquiry and reflection and interconnections between personal identity and the claim of experiential knowledge (Noffke, 1997).

Meaningful work

Part of understanding the role as I perform it and as I have described it may be explained by Bateson (1989): “But what if we were to recognize the capacity for distraction, the divided will, as representing a higher wisdom?” (p. 166). In this world of multi-tasking and “multiple commitments” (p. 166) with days like those I have just described, I frequently come close to the point of complete exhaustion – often very much on the edge. And despite that, and perhaps even because of that, I am energized to do more, to be better at it. “No one who is passionately engaged in his or her work limits it for long to forty hours a week. Positions carrying the greatest challenge or responsibility are predicated on this assumption” (Bateson, 1989, p.167). I draw on a feeling, “a psychic ‘energy’ which might better be called vitality” (Bateson, 1989, p. 169), of making an important contribution to improving teaching and student learning that motivates me to keep moving ahead. In these examples, I am working with a state of mind and vitality (Tillich, 1952) that are genuinely satisfying. They are also part of recurring patterns and connections based primarily on the unifying strength of my values as a professional educator and my desire to use my influence to create a school system and society that benefits students, families, communities and educators. I see myself as part of a learning community with an openness to improvement and with much to learn.

*If you know what is within you, and you bring out what is within you,
what is within you will save you. If you know what is within you, and
you do not bring out what is within you, what is within you will destroy
you (Gnostic Gospel of St. Thomas in Clarkson, 2000).*

In explaining my practice, I draw on a range of literature and theory. I do find it helpful but insufficient to explain the complexity of my practice. I am keeping in mind that “The complexity of an individual’s position in society should, not even for a modest research exercise, be simplified too much” (Erben, 1998, p. 8). Because I have

never felt that someone else's conceptual framework can explain my life and learning, I find some comfort working in the context of “the loss of legitimizing metanarratives” (Lather, 2000). As Lyotard (1984) writes in his book on the postmodern condition:

A postmodern artist or writer is in the position of a philosopher: the text he writes, the work he produces are not in principle governed by pre-established rules, and they cannot be judged according to a determining judgement, by applying familiar categories to the text or to the work. Those rules and categories are what the work of art itself is looking for. The artist and the writer, then, are working without rules in order to formulate the rules of what will have been done (Lyotard, p. 81).

In one sense I am such a postmodern writer. My writing, as part of my educative discourse, is one of the ways in which I give a form to my life. In this sense I see myself as an artist who is giving a form to her own life through her productive work. In forming my life, as a postmodern writer, I am working without rules in order to formulate the rule of what has already been done.

In another sense I am constrained and supported by rules. As a superintendent of schools, my 'system responsibilities' are full of rules. There are legislative rules governing everything from curriculum expectations to educational finance to health and safety in the workplace. I have a range of responsibilities set out by the Board and to which I am accountable in my annual performance appraisal with my Director. In working as a senior administrator and educational leader within a school board I accept that I work within a context governed by rules set by the Provincial Government and the democratically elected Trustees of the Grand Erie District School Board. Yet, because I view rules as guidelines, not barriers, I am also exercising my judgement and discretion in a range of contexts and in ways which enable me to see myself as a professional educator and knowledge-creator.

I want to embrace the position of a postmodern writer to explain my influence as a superintendent while at the same time coming to understand the nature of the external forces. I will draw on the traditional forms of theory but I am thinking of doing this in a way which transcends their analytic categories in the creation of my own living theory (Whitehead, 1999) of my educative influence as a superintendent of schools.

Next I will examine how economic rationalist policies have affected education in Ontario, describe the background and context of being a superintendent during the period of the amalgamation of school boards, explain the work of Executive Council and the elected trustees of the school board and the policy development process.

The impact of market forces in Ontario

Economic rationalist forces (MacTaggart, 1992) have been at work in many countries in the world with the U.K. having experienced it for over seventeen years (Kushner, 2000) and other countries like New Zealand, Australia having had similar experiences. The impact in Ontario has been to demoralize educators and to reduce the powers of the teacher unions and school boards. It has also meant bringing dissenters in line for fear of reprisal and centralizing control in the Ontario Premier's office so that decisions ranging from financing of schools to monitoring the amalgamation of school boards are made by the Premier and a few of his closest advisors.

In the years 1990-1999, a number of forces converged in Ontario to create a crisis in education. Some of these forces included a public backlash against the steadily increasing strength of teacher unions, particularly The Ontario Secondary School Teachers' Federation (OSSTF), since the 1960's and resultant wage increases. In addition to the downturn in the Canadian economy that hit Ontario particularly hard, there was a visible shift to the right in the philosophy of voters to a "survival of the fittest mentality" with concomitant cuts to spending on social programs and a market forces mentality which pushed education to become more business-like.

These factors and media pressure resulted in low teacher morale which led to the largest teacher strike ever- 140,000 teachers on 'political protest' for 2 weeks, 27 October to Friday, 7 November, 1997, to fight the new legislation (Gidney, R. 1999, p. 260). The conservative government was determined to enact the largest restructuring of education in the history of the province. It included a more rigorous curriculum, extensive testing of all students in grades 3, 6, 9, 10, mandatory membership in the new College of Teachers for all educators in publicly-funded schools, testing and re-certification of teachers, highly-prescriptive provincial funding formula, amalgamation of school boards, reduction in power and numbers of trustees and superintendents and removal of principals from unions. According to Mike Harris, premier of the province: "Too many boards, too many trustees, too many bureaucrats, *too many certificated teachers*" (Gidney, 1999, p. 244). In addition to continued labour unrest, there have been mass departures of teachers and administrators via early retirement incentives to reduce the size of the educator workforce with the resulting teacher and school administrator shortage (Carter, 2001, p. 37-41).

Most of these forces were not peculiar to Ontario or even to Canada. In countries all over the globe, there has been restructuring of education with a variety of agendas, predominantly a conservative agenda with shades of Thatcherism. That agenda has been given serious study and commitment in Ontario. Historically in Ontario there had been a curious mixture of local autonomy and central control. The local structure had been school boards with trustees elected at the same time as municipal politicians for a three-year term. Under the conservative rule, the structure became increasing school-level autonomy not board autonomy, represented by creating School Councils and taking local taxation for education away from school boards. The apparent increase in the proportion of funding to the classroom, a new provincial curriculum, school accountability for provincial test results, and direct communication with schools as opposed to funneling information through school boards all contributed to control being increasingly centralized in the Office of the Premier in Ontario. That central control has been achieved by a strategic reduction in the power of dissenting voices

such as teacher federations, school board trustees and administrators and by a flood of major changes in quick staccato rhythm designed to keep the education community off balance, struggling to stay afloat and too weakened to fight back.

Like Geoff Whitty, "I have a particular interest in the relationship between education and social equity...and as Moe (1994) suggests, the creation of quasi-markets is likely to exacerbate existing inequalities, especially in instances in which the broader political climate and the prevailing approach to government regulation are geared to other priorities" (Whitty, 1997). In his review of research literature on parental choice and school autonomy, he looks at events in England, New Zealand and the United States. It appears that the research from these countries has informed the direction of the Conservative government in Ontario. Some movement to vouchers for parental choice emerged as of September, 2001 in a \$3500.00 allowance for parents who wish to send their child to a private school, although there is still considerable debate as to implementation. This legislation is being reviewed in the midst of a party leadership debate in 2002. "Flaherty (leadership candidate) appears to be driven by ideological argument of choice. At the same time, he speaks of the importance of publicly-funded education" (Dean, 2001). Even without the vouchers, parents looking to locate in the board area demand copies of test results of particular schools so they can choose where to buy a house. This is parental choice and opportunities available only to those in a particular socio-economic position in the housing market.

Pressure to move toward site-based management is in full steam in Ontario despite the fact that it has not been shown to improve the quality of children's learning although it does appear to increase efficiency of resource management and to turn principals from curriculum leaders into business managers (Whitty, 1997, p. 23-25). Whitty (1997) says that "Atomized decision-making in a highly stratified society may appear to give everyone equal opportunities, but transferring responsibility for decision making from the public to the private sphere can actually reduce the scope for collective action to improve the quality of education for all" (p. 33). He also says that:

...the studies reported here suggest that going further in the direction of marketization would be unlikely to yield major overall improvements in the quality of education and would almost certainly have damaging equity effects. The broad conclusion of these studies seems to be that, although the rhetoric of reform often suggests that the hidden hand of the market will produce the best possible outcome, the reality suggests that this is unlikely to occur. Nor, apparently, has decentralization to schools and local communities done much to correct inequalities in the system (p. 34).

Recognizing that no system is perfect and seeing a current movement toward more conservative attitudes (Adams, 2001), still I agree with Whitty (1997) that:

Part of the challenge must be to move away from atomized decision making to the reassertion of collective responsibility without re-creating the very bureaucratic systems whose shortcomings have helped to legitimate the current tendency to treat education as a private good rather than a public responsibility (p. 37).

As I have written (DeLong & Moffatt, 1996), I strongly agree with him as far as fostering parental/community involvement is concerned, "We need to ask how we can use the positive aspects of choice and autonomy to facilitate the development of new forms of community empowerment rather than exacerbating social differentiation" (Whitty, 1997, p.37).

I am reminded as I read Whitty's (1997) conclusions that one of the ways that I do the job of superintendent is to make the less-than perfect political processes work for children, families and teachers. One area of research that is clear is that when parents are involved in their child's learning, achievement rises (Ross, 1994). The system wasn't perfect before this government took office and it isn't perfect now but there are

ways of massaging it that allow me, as a postmodernist, to operate according to my principles and follow the spirit, if not the letter, of the law.

BACKGROUND AND CONTEXT OF BEING A SUPERINTENDENT IN 1995-2002

The political context of this period of time and the structure of the boards is significant to the reader's understanding of this story. I researched my practice from March, 1996 until February, 2002 as a superintendent in a rural, semi-urban school board in southern Ontario, Canada. The transformations that I speak of straddled the amalgamation of three school boards during the most dramatic restructuring of education in history of the province of Ontario (Gidney, 1999). From January 1, 1995 until December 31, 1997, I was superintendent in The Brant County Board of Education, a school system of 17,000 students, a school board of veteran trustees, a lean, carefully-financed system and an experienced senior administration. Those years were ones of deep learning, regular improvement and feeling valued.

The story of my time as a superintendent in the Brant Board prior to amalgamation is one of a steep trajectory of learning the job, of great excitement about the unlimited potential for improving the system and of having the educative influence to do that. There were challenging days and circumstances but I felt (and the director evaluated) that I was effective in the job and I had much to learn and to share (Moffatt, 1995-2001). I had just been one of the reviewers of the provincial curriculum, The Common Curriculum, policy document for Grades 1-9, 1994 with Linda Grant and then a writer of the new version (1995) with project manager, Ron Wideman, at the Ministry of Education. I had a supportive director in Peter Moffatt (Moffatt, 1995-2001a), a good relationship with trustees and was part of a strong executive team that challenged each other and worked well together. There was conflict to be sure but problems were solved without rancour. I felt that our Wednesday morning Executive Council meetings were the high point of the week. We worked hard but we laughed a lot.

The Progressive Conservative government elected in June 1996 came with a mandate of economic rationalist policies (MacTaggart, 1992) and a clear intention to

restructure the education system in every respect. These policies, implemented in great haste, affected every aspect of our jobs as senior administrators – curriculum, staffing, system structure, funding, union membership of principals, governance. As I was reading Kushner's (2000) description of the policies of the government in Britain, I could have substituted Ontario for Britain:

The cusp years of the millennium mark a period of largely unquestioned national consensus over the nationalization of curriculum, test-based accountability, competency-based education (behavioural objectives) absolute standards of attainment, politically defined notions of excellence and outcome-driven measures of effectiveness. Educational inquiry is fiscally confined to a narrowing policy agenda and there is corresponding intensification of intolerance for independent critique. All of these things are seen as necessary and reasonable for measuring and enhancing the productive efficiency of schooling to support social reform – they will enhance the achievement of large groups of pupils. But they are counter-productive to effective personal education. We can, for example, encourage young people to pass more criterion-referenced assessments or to strive for intellectual autonomy – they cannot do both at the same time, for these demand mutually exclusive curriculum strategies and they emanate from opposing ethical positions. One demands compliance with a predetermined set of principles (in exchange for credentials); the other exposes those principles to critical scrutiny – that is, one accepts the authority of the government, the other challenges it. We might have the right methodology, but we apply it to the wrong problem. Perhaps most prejudicially, where educational leaders are concerned with educational process it is now with 'teaching and learning', that is, those elements which are most susceptible to measurement and control and where knowledge is given. We risk losing sustained enquiry into curriculum – that is, the level at which we have to confront questions of

the ethics, morality, politics and validity of the educational experiences we offer to young people (p. 203-204).

The first impact across Ontario came from the amalgamation of one hundred and four boards down to sixty-six and in our region, three school boards to one school district. At the same time that these massive changes and their inherent administrative challenges were being downloaded to the school system, the number of superintendents in the new school district was reduced from seventeen to twelve in the former jurisdictions and then to seven. During the four-month transition period, September to December, 1997, we were all wondering about our own jobs and about who would be our new leader, given that there were three directors from three boards. It was a great relief when Peter Moffatt was appointed director but then my worry was whether I would have a job on his team given that I had the least experience as a superintendent amongst the group.

The transition from Brant To Grand Erie

Early in 1996-7 the new Progressive Conservative government talked of amalgamating school boards and by June of 1997 the decision was made. January, 1, 1998 gave birth to School District #23, later to be named Grand Erie District School Board, an amalgamation of the Brant, Haldimand and Norfolk Boards of Education, the latter two much smaller and mostly rural boards with a total population of 33,000 students. To my knowledge, there was no one in any one of the boards who was happy about this decision but some responded more negatively than others. Because I came from the largest board, I was attributed with the negative characteristics assigned to a larger-sized board. While I was not feeling positively about the change I accepted it as a fait accompli and saw it as my job to get on with the task of building a new board. That is not to say that I didn't bring my biases from the Brant Board. The fall of 1997 was spent in alternately resisting and managing the change process with three different senior management teams from three different cultures and three different views on how things should be done.

The board of trustees selected Peter Moffatt as the Director of District School Board #23, Gerry Townsend, former Director of the Norfolk board, became Associate Director and Frank Kelly, former Director of the Haldimand board, served as the Transition Coordinator with a severance package to retire on completion of the transition task in December, 1999. The relationship between Peter and Gerry was strained and reflected in our Wednesday meetings. Frank focused his attention on the reduction of the senior management and office staff. It was an awkward and tense time with senior administration in a state of flux.

Creating the new Grand Erie District School Board

The six-month period of January to June 1998 was the start-up and downsizing of the administration. This was a time of great strain for me because I was the lowest in seniority with the exception of the superintendent on two-year secondment (although technically since we were all on personal contracts, seniority did not exist). Without the downsizing I would be demoted. My e-mail to Jack called *Black Day* on April 3, 1998, said: *Three superintendents to go and I'm number three*. Fortunately, three accepted severance packages and I kept my job. It's important to remember that through all this chaos, the work of the schools and the school system continued with the usual demands on us to perform with care and competence.

In the fall of 1998, the new team of Peter Moffatt, two former superintendents from Haldimand, Dan Dunnigan and Gerry Kuckyt, three from Brant, Colin Armstrong, Jim Grant and I, and one from Norfolk, Wayne Thomas, started the work of creating a vision and developing policies and procedures for a new school system. In order to change the alignment from the former boards, I was assigned the schools in the former Norfolk area and Wayne went to Brantford. I thought it was a good idea albeit greatly increasing driving distances for me; Wayne did not. This was just one of many conflicts between Peter Moffatt and Wayne Thomas and Wayne and I. The differences in philosophy were tangible. This dissension was a canker sore for the team.

Peter and I both felt that we needed to realign the areas of the board away from the traditional boundaries. Norfolk was an alien, hostile and strange environment with a culture very different from what I had known. And I was the “broad from Brant”, from the “takeover” board, the big board, and the big city. These were unfamiliar concepts for me but reality in perception all the same. In addition, my first task was to close small schools which the new funding formula demanded, not a task designed to make friends.¹⁷ I was in essence entering a new board that had not chosen me to lead them and they felt resentful.

Change continued in 1999 with an election and a new set of trustees and several turnovers in superintendents: one leaving for an Associate Director job, another returning from another board, one retiring and another being hired. Then in October of 2000, Wayne Thomas went off on sick leave. At end of March, 2001, Wayne had not been replaced but a principal, Rick Denton, was seconded as Principal-Leader to pick up his Special Education portfolio duties. There were rumours of a lawsuit based on harassment. It seemed that the team would not get settled in any permanent sense.

From January of 2001, Executive Council, which now included Peter’s Executive Assistant, Wendy Hibbard, and later Rick Denton, seemed to take a turn for the better. There was a more relaxed atmosphere; agenda items were covered more fully and on time. There was more laughter. In the spring of 2001, the trustees replaced two retirees with John Bryant and Rick Denton. The Planning meetings in June and July reminded me of the pleasure of Executive Council in the former Brant Board: a cohesive, relational team focused on a new and improved school system.

THE TRUSTEES OF THE BOARD OF EDUCATION

I am an employee of both the Grand Erie District School Board and the Ontario Ministry of Education. The board of trustees directly supervises one employee - the

director. The superintendents report to the Director, Peter Moffatt, and our performance is evaluated and reported by Peter to the trustees. This is significant in that when trustees want information or reports, they must make a motion at the board meeting, agree to it as a majority of the group and direct the administration through Peter to bring the report. All board reports include his name as well as the superintendent responsible.

The trustees are elected by the voting members of the municipalities on a three year cycle at the same time as the municipal elections and their numbers and responsibilities are governed by regulations under the Education Act. Prior to amalgamation their responsibilities and autonomy were more extensive. Part of the chaos of amalgamation was their anger at their treatment by the government, the reduction in their numbers and the limiting of their powers. This reduced power came largely as a result of the funding of education being transferred from a combination of taxation in the local municipality and grants from the province to full funding from the province in a very prescriptive form.

The world of the trustees during amalgamation

The Grand Erie District School Board meets three times every month, except July, for three hours. The meetings have two parts: open session for most of the agenda where press and community attend and in camera for discussion of property, finance, legal and personnel items. The media attend the open sessions and remain until after the in camera to hear the report of decisions made there. My role is to present reports and policies, make presentations, and respond to questions. When I have staff or parents making presentations, I help them understand the expectations and the process of presenting to the board. When I don't have reports or presentations, I attend to the debate and often get paperwork done that does not take my full attention.

¹⁷ See Chapter 2B.

Before amalgamation, my relationship with the fourteen trustees of the Brant County Board of Education was one of respect and trust. Even prior to my appointment as superintendent, in most cases, I had worked with them on committees and there was an openness and care. Over the three years, that relationship deepened as evidenced in my performance reviews (Moffatt, 1995-2001a). When amalgamation of the boards occurred, a new smaller group of ten trustees, a combination of representatives from the three former boards led the board in the years 1998-2000 and then in December 2000, another election and another group was elected. The first group of trustees that led the Grand Erie District School Board was made up of veterans from the former boards with the addition of an appointed student trustee. They were feeling much the same emotions as the teachers in that the government was sending them the message that they were not valued. Their numbers, honoraria and power were reduced. They lost the right to raise taxes and were given a very prescriptive funding formula. It saddened me to listen to their hurt.

One of those long-serving trustees who lived through the anger and hurt of those downsizing and downloading years was Astrid Reeder. She was incredibly supportive of teachers and schools and consistently positive at board meetings and at public meetings. The staff loved her because she was frequently in schools and made them feel valued. Only after the unrelenting bashing of schools and school boards did I hear Astrid talk of negative things at the board table. She was chair of a School Accommodation (Closing) Study and felt the anger of the community directed at her as agent of the government and clearly her heart was not in the pressure to reduce excess spaces in our buildings. Yet she knew that the money was not coming from the government to pay for the unused classrooms and we were facing continuing enrolment decline.

She was very supportive of my work in action research. She came to hear Jack speak on several occasions and was impressed by the professional nature of the process to improve teaching and learning. Her involvement in coming to understand the process and the potential impact of teachers researching their practice to improve student

learning was significant because trustees determine budget allocations and I needed that political support at the board table. Astrid's particular love was for the Home & School Association and for the increased involvement of parents in schools. She did not run for re-election in November, 2000. It was too hard for her to continue in such a negative environment.

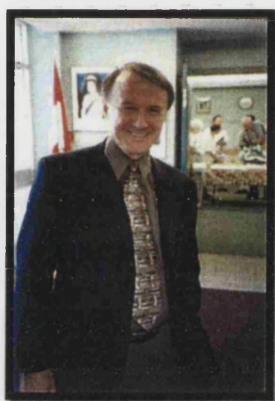
The second group of trustees for the new board, elected in December, 2000, included four veterans, five newcomers and one native trustee who had served on a former board. The new trustees came with limited understanding of the complexity of school systems and some with negative experiences from school closings. The trust that had existed in the former boards was not there. There was even distrust between the veterans and the new arrivals. Part of that stemmed from the fact that the new group came *in media res*, mid-budget year, having to make decisions within assumptions established by the former board. The first months of the new board were challenging.

My experience with trustees has been that they are good people who want to do a good job. When they make poor decisions, it is with good intentions and sometimes it is because I haven't given them the information they need or I have not anticipated well enough. The early days of the new board were very demanding because they had not assumed the vision and values of the old board and were working through the assumptions on which they wanted to make decisions. And there were two groups: the veterans who knew what they wanted and the new trustees that were learning as fast as they could. It was hard for Executive Council to anticipate whether they wanted more or less data. Too much was overwhelming and too little was insufficient. We were learning and growing together.

In this next part, I examine the work of the Director and Superintendents as an administrative team which is critical to the understanding of my role as superintendent, the most important element being my relationship with Peter Moffatt, the Director.

ADMINISTRATIVE COUNCIL

My relationship with the director



Peter Moffatt, Director of Education for Brant and Grand Erie. We have worked together for 20 years.

I want to diverge here to share a description and explanation of my most significant relationship in Executive Council and, indeed, for the past 20 years of my career– Peter Moffatt, supervisor, mentor and friend. In the early 80's when Peter was a new superintendent in the Brant Board and I was a Special Education Department Head at Paris District High School, he taught me to write curriculum course outlines that articulated the rationale for the content. This was an important learning for me as I had not thought through the value and relevance for the students inherent in the learning embodied in the course. It seemed an obvious missing element in my understanding of why I taught what I taught.

This expectation of comprehending and assessing why a program or service is needed is a recurring theme in our work together. As I have moved through the various posts in the boards, Peter has been teacher, advisor, confidant and advocate.

The years of the transition and amalgamation were excruciatingly difficult, even damaging for my self-esteem. With my job at risk, I felt like a cast-off. He was my main support in working through the whole process and especially the January to June, 1998 span which was like a roller coaster ride. Would I keep my job or not?

We are of like minds on many topics (DeLong & Moffatt, 1994-2002) but, in particular, in our views of standardized testing, curriculum design, focus on improving student learning, parental involvement and reflective practice. The resistance to

market values and standardized testing in our board is at least partly attributable to our aversion to the pressure of the government to measure student learning by testing certain parts of the curriculum and teacher competence through media publication of test results. When Diane Morgan and I, who were both influenced by Peter's research and experience, wrote the Ontario ASCD article "What Have We Learned From Grade Three Testing?" (DeLong & Morgan, 1998), we were reflecting ours and Peter's responses to the limitations of mass testing of children. It also showed that we were working at finding ways to make the data derived from the testing useful for improving student learning. When I created the Learning Strategies course (Aslin & Foerter¹, 1984), it was with Peter's support to start with the student in mind in the design of curriculum. The philosophy and strategies that Peter and I wrote about in "Building A Culture of Parental/Community Involvement in Brant County" (DeLong & Moffatt, 1996) captured in writing our dialogue and reflection, research and learning over several years.

It would have been impossible for me to have created and built the action research networks in the board and indeed in the province² without Peter's support and encouragement. At times, he has deliberately put obstacles in my way when he thought I was going too fast (and, at times, I was) but mostly he cleared obstacles so I could move ahead. During the restructuring process, he warned me that I would be unable to continue on the path I had set of continuous progress and improvement. I didn't want to hear this and refused to accept it. His warning proved to be true but, according to my 1999-2001 performance reviews, I accomplished more in that time than he had anticipated. (Moffatt, 1995-2001a)³ Sometimes that was accomplished at considerable cost to me, whether in physical and emotional demands or in the perception that I pushed too hard. On the other hand, some of the accomplishments came out of that persistent and tenacious drive for improvement. Peter informed the Education Improvement Commission in August 26, 1999 that in order to bring the

¹ Foerter was my married name.

² See Chapter 3B.

³ See pp.476-483 & 486-491 of the Appendices.

most reluctant partner of the three boards to the amalgamation into the new organization, he sent out his most tenacious superintendent to lead the process.

He has been a positive role model for me in his planning and visioning capacities, in his ability to manage and analyze large amounts of data, in his ability to ask insightful questions, in his commitment to student learning and in his integrity. In his workaholic modelling and lack of balance in his life, he has not been a good role model. I have learned this model too well but it is my responsibility, not his. When one superintendent left for another board, he said that by comparison with his new board, we work much harder and try to do too many things. Because much learning is reciprocal, I think that I have influenced him to soften his public image and open up to the need for more public relations – at least a little. His annual evaluations of my performance tell me that he is pleased with my work but that he still sees me too focused on task (Moffatt, 1995-2001a).

Peter Moffatt and I are very different personalities but have had time to learn each other's strengths and weaknesses. He is introverted and processes internally; I am extroverted and need the dialogue to process ideas.²¹ Therefore, I will ask him at Executive Council to stop long enough for the conversation necessary for my understanding of the issue. I have to say that there were more opportunities for this in the Brant Board than there have been since amalgamation. It seems that there has been less time for dialogue and understanding and I have felt, on occasion, left out of the decision-making. It is testimony to the strength of the relationship, Covey's "emotional bank account" comes to mind (Covey, 1989), that despite the difficult times that we have been through that our relationship has survived, withstood the tension and been strengthened.

²¹ See Chapter 5.

The forms and activities of Administrative Council

In terms of rhythm of the work, Wednesdays are the meetings of Administrative Council. It takes three forms: two meetings a month as just as Executive Council (Director and Superintendents); one as Program Council with the addition of principal representatives from each family of schools and the Curriculum Coordinators; and one as Planning Council with principal representatives from each family of schools and senior managers. Even on Program and Planning Council days, Executive Council meets after them. Each Wednesday, Executive Council reviews the board meeting agenda with the attached policies and reports. I have described the board process earlier in the chapter. In addition to the priority position of the Board items, Executive Council agendas²² reflect the variety of other tasks demanding attention. School-based issues are second priority on the agenda, issues such as setting up selection teams and appointing principals and vice-principals, school enrolment and staffing, planning for building changes and any concerns that come from our families of schools. Last are system issues like budget, transportation and any issues related to any of our system portfolios. Because of the large numbers of retirements (Carter, 2001), the school administrator appointments have taken much attention in the years of the new board.

In addition to Executive Council, there are two other forms of Administrative Council. Program Council considers and approves curriculum, assessment, and special education presentations, reports and guidelines for the system. Planning Council considers and approves planning issues and is the body that manages the Educational Change Fund.²³ This fund is one of the innovative structures that we have designed as an administration. Individuals and groups in the system can apply for money from the fund of between \$300,000 and \$500,000 to research and implement innovative

²² See Wednesday, June 14, 2000 earlier in this chapter.

²³ See Chapter 3B.

projects for improving student learning. Each spring Planning Council asks the recipients to report on how the project has accomplished its objective and has used the information to expand programs to the system. The projects that are approved are usually connected to one of the areas of emphasis for improving the system which are also determined by Planning Council. I have tapped this fund for supporting action research. The principal representatives on the council are responsible for reporting activities and decisions to their families of schools and for bringing any issues forward.

After Executive Council meets, I have a list of follow-up activities. These may include informing staff of decisions, items for the Family of Schools meeting, changes in reports going to the board or further work on a report after input from the group.

Policy Development

Policies articulate the philosophic basis for decision-making in the system. Policies should guide, enable, protect and liberate, not restrict, prevent, block or encumber staff from doing their jobs to the best of their abilities. The implementation principles and directions embodied in procedures are intended to guide consistent approaches to activities in the system. **Consistency** is a relative term when one is working in a very human enterprise. The creation and adoption of policy and procedure is one of the ways that I influence the way the system works.

The superintendents and director of Executive Council manage the school system in daily operations and bring draft policies to the trustees for debate and decision. Getting a policy through the board starts with the development of policy and procedures with staff and sometimes community members, presentation for approval of Executive Council and then presentation to the board. Once the trustees set policy direction, Executive Council manages the implementation of the policy. It is my role to bring all the information I have to the Executive Council for debate and refinement at that level and then present the report to the trustees so that they can make informed

decisions. There are many points along the way when I have to think about the politics. If I don't, the work can get sidelined or destroyed. The role of Executive Council is to ensure that the policy is given careful consideration before it is presented at the board table.

Once developed and approved by the members of Executive Council, policies are presented, discussed and recommended in principle at the board table and then sent out for discussion by various employee groups and school councils, circulated to the system for concerns and then, based on the input, passed with or without amendments by trustees. This is at least a three-month process. Policies are reviewed regularly to ensure that they reflect changes in legislation, philosophy and practice. Over the years as a superintendent, policies that I have created and the board has adopted range from School Councils and Parental and Community Involvement to Career Education and Staff Development¹. Staff Development policy includes action research networks and processes.

In the next chapter, I will describe and explain my living educational standard of valuing the other in professional practice. This value will be evident in my educative relationships with a teacher and a principal and in my work as I do the job of superintendent in my two families of schools.

¹ See Chapter 4 and pp. 453-460 of the Appendices.

Chapter Two

COMMUNICATING MY VALUING THE OTHER IN MY PROFESSIONAL PRACTICE

UNDERSTANDING MY VALUING OF THE OTHER

The first part of this chapter presents two studies of singularity with Greg, a principal, and a teacher, Cheryl. The second part is a story of my family of schools' principals and vice-principals, a view of our learning together, my relationship with two principals, Kim and Greg, a parent and a teacher. These studies connect my value and standard of practice of valuing the other to my sustained support for a relational form of educational leadership that explores possibilities for democratic and non-hierarchical systems in the context of extending my educative influence.

In the narratives I demonstrate that my learning and relationships are created and sustained out of the dialogic processes that are natural and indeed crucial for my ontology. Through the recounting of the stories, their construction and deconstruction, the meanings of my embodied values are clarified in the course of their emergence in practice. **This process of clarification transforms my experience of my embodied values into publicly communicable standards of judgement to which I hold myself to account in the sense of testing the validity of my claims to educational knowledge.** Having said that, I will be showing you that I am frequently a "living contradiction" (Whitehead, 1989) as I find myself unable to live my life fully according to my values in the sense that I hold certain values and experience them being negated in my practice. My "true north principles" (Covey, 1989) have remained firm but my values have clarified and sometimes changed as a result of action and reflection during the period of my research.

While I believe strongly in the importance of narrative as a means to explicate my life, I do recognize the tension that I have felt at reading the narratives of the practitioner-

researchers in the work of Connelly & Clandinin (1999) which I felt stopped at the point of story-telling. My stories have an educational intention, not merely to stand on their own as stories. They also have a role in the creation of community as I share them with others. "Some say that community is based on blood ties, sometimes dictated by choice, sometimes by necessity. And while this is true, the immeasurably stronger gravitational field that holds a group together is their stories...the common and simple one they share with one another." (Estes, 1993, p. 29 in Bolman & Deal, 2001). I will be clarifying my standard of the valuing the other in professional practice in the narratives in this chapter.

In the descriptions and explanations of the significant relationships in my life as a professional educator you will see that I am consistently exhibiting expectations for myself and others that are not limited or restricted by bare data or purely factual information. This may appear at times to be bordering on the fantastical or fictional. **You will see that the hope that I carry, the optimism that I exhibit, the faith that I hold in the capacities and potential for people to reach my seemingly unrealistic expectations to improve student learning are well-founded.** Marion Kline's (teacher and program consultant) message seems to capture that intent: "You are a little like a lighthouse for me. You keep me focused on where I am going. You have always supported me but at the same time let me find my direction on my own" (e-mail, May 29, 2001).¹ As I communicate that valuing the other, the I-You relationship is extremely important in accomplishing what I-We do in that "he will be guided by the recognition of values which is in his glance as an educator" (Buber, 1947, p. 122).

People like Marion Kline articulate that they are buoyed by this motivation and frequently tell me that my faith in them gives them faith in themselves. The evidence for that is located in e-mails and writing from many people including principals, teachers, masters group projects and in the success of many like Marion and Cheryl Black and Greg Buckles and Kim Cottingham². **Furthermore, when the**

¹ See Chapter 4.

² See later in this chapter.

vision I create of a better world, of improved learning, of improved social order (McNiff, 1992) is not fulfilled, I do not deem it a failure, just limited progress on the path to the preferred future. I never lose sight of my purpose to enable others to improve education and learning through seeing their potential, their value to create a better world. There is no 'Ten Ways to Improve Education.' There is only working at it, getting it wrong, and maybe eventually, who knows how or why, getting it right. Even in the midst of restructuring and amalgamation, I pushed and struggled to keep that faith, the vision of continuous improvement – and except for a few months of lost momentum – managed to maintain it, even if at a slower pace.

In order to comprehend my meaning of valuing the other in professional practice, it may be necessary to examine the contrary, to juxtapose some of the ugly years of my life and my learning and values clarification from them. My deep understanding of my need at all costs to protect the personal relationship derives from my life's experiences with my ex-husband in which I have felt that I was not valued: twenty-three years of living with and dealing with controlling behaviours and aggression. Over that time, 1970-1992, I learned coping mechanisms to deal with them and clarified my commitment to believing in the capacity of valuing and caring for the other. (Noddings, 1984, Gilligan, 1982) I feel, and my children confirm (Foerter, 1999), that unconditional love permeates my relationships with them. My values which are my standards of practice emerge out of life's experiences and my theorizing about them comes from the practical experiences.

As I add my voice and those of my colleagues to the knowledge base of teaching and learning, I write in response to Coulter (1999), that "...indeed there is a curious absence of voice: administrators and teachers do not fail students, they implement policies according to objective criteria; researchers present impartial data in third person narratives" (p. 7). I concur that we do need to hear the voices of teachers and administrators but neither they nor researchers are completely impartial. The criteria that I use and those around me use are frequently very personal and not all objective. Coulter (1999) recommends Bakhtin's ideas on dialogism, of Chronotope, Polyphony

and Carnival (Bakhtin, 1981) as ways to include more voices, a better understanding of context and time in the research and to find 'truth'. "Truth, for Bakhtin, emerges from a genuine communication between people; it is not imposed by one partner on the other. Truth is "born **between people** collectively searching for truth" (Bakhtin, 1963/1984a, p.110 in Coulter, 1999, p. 7). My 'truth' will emerge in the narratives of *genuine communication between people*.

In the following studies I will be highlighting the emerging clarification of my standard of my valuing the other in my professional practice in two studies of singularity (Bassey, 1995) and in descriptions and explanations of my families of schools through the use of **comic font**.

A) TWO STUDIES OF SINGULARITY

A case study or study of singularity approach

I present these two case studies as a means to explain the depth of the relationships that are central to my values in my life and work. The "studies of singularity" (Bassey, 1995) provide evidence of a kind of relational leadership. Also I believe I am responding to Regan and Brooks (1995)³ when they encourage the examination of leadership through this lens of relational leadership (p. 93). I have chosen my relationship with these two people for in-depth investigation because of the reciprocal nature of our learning and because of the depth of the relationship with people at different 'levels' in the hierarchy of position and power and to examine and analyze how I influence people. I wish to emphasize that while the case study of Greg mostly precedes that of Cheryl, they are not intended to be sequential. These case studies were selected to show my embodied values, not to develop the sequential notion of learning. The respect and care that I feel for Greg Buckles and Cheryl Black and that we share for each other may generate questions around preconceived notions of power

³ See Chapter 4.

relations and open thinking on the possibilities for democratic and non-hierarchical systems that “interact positively to advance the organization’s purposes”:

Politics is as much part of schooling as learning. Power is everywhere in education (Ball, 1987). Teachers exercise power over their pupils, senior managers exercise power over their teachers, and the smarter teachers know how to manipulate or manoeuvre around senior managers. Politics is about acquiring and using power and influence. At their worst, micro-political environments make a school dysfunctional and prevent positive change (Sarason, 1990). At their best they interact positively to advance the organization’s purposes (Stoll & Fink in Stoll & Myers, 1998, p. 201).

On the subject of case study, even though “there seems to be little agreement about what case study is” (Lincoln & Guba, 1985, p. 360 in Bassey, 1999), I am in agreement with Michael Bassey (1999) as he sets out “to reconstruct the concept of educational case study as a prime strategy for developing educational theory which illuminates educational policy and enhances educational practice. I set out to do this by identifying and focusing on a particular form of educational case study, which I feel is ‘theory-seeking and theory-testing case study’” (p.3). These case studies and others in the thesis are “studies of singularities” as opposed to “studies of samples” and are “interpretations of what has happened”, not “predictions of what may happen in particular circumstances” (Bassey, 1999, p. 3-4). I do not, however, concur with his assumption that studies of singularities (which embrace action research) may lead to “fuzzy generalizations” (p. 4). From these studies I draw personal knowledge and theorize about the nature of the educative relationships that I have with various people. The originality of the contribution of this thesis to the academic and professional knowledge-base of education is in the systematic way I transform my embodied educational values into educational standards of practice and judgement in the creation of my living educational theory.

On this subject of case study activity, Michael Bassey (1999) cites Stephen Kemmis (1980):

We must find a perspective on case study work which preserves indeterminacy, which countenances both the objects and methods of case study work, and which reminds us of the dialectical processes of its construction. If someone asked, 'what is the nature of case study as an activity?' then a proper response would be, 'Case study consists in the imagination of the case and the invention of the study' (p. 119) (p. 24).

As well, Bassey (1999) referenced Stake (1995) who described the intrinsic case study as “research into a particular situation for its own sake and irrespective of outside concerns”:

“The case is given. We are interested in it, not because studying it we learn about other cases or about some general problem, but because we need to learn about the particular case.” He also warned of the danger of overstating findings: “Good case study is patient, reflective, willing to see another view of the case. An ethic of caution is not contradictory to an ethic of interpretation” (p. 3) (p. 12).

Stake (1995) introduced the term “naturalistic generalization” which meant “conclusions arrived at through personal engagement in life’s affairs” (p. 86) and as well made the case for the value of including personal details and vicarious experiences:

To assist the reader in making naturalistic generalizations, case researchers need to provide opportunity for vicarious experiences. Our accounts need to be personal, describing the things of our sensory experiences, not failing to attend to the matters that personal curiosity

dictates. A narrative account, a story, a chronological presentation, personalistic description, emphasis on time and place provide rich ingredients for vicarious experience (p. 87)(Bassey, 1999, p.33).

Despite the objections of a variety of critics as to the value of case study (Bassey, 1999, p. 34-35), I see much merit in the work of Helen Simons (1996) where she welcomes the paradox between study of the singularity and the search for generalization which “yields both the unique and the universal understanding” (p. 225):

[We need to] embrace the paradoxes inherent in the people, events and sites we study and explore rather than try to resolve the tensions embedded in them...Paradox for me is the point of case study. Living with paradox is crucial to understanding. The tension between the study of the unique and the need to generalize is necessary to reveal both the unique and the universal and the unity of that understanding. To live with ambiguity, to challenge certainty, to creatively encounter, is to arrive, eventually, at 'seeing' anew. (Bassey, 1999, p. 237-8).

My world as a professional educator, educational researcher and senior woman manager abounds in paradox, tension and ambiguity, as do case studies or studies of singularities; therefore, they seem to be an appropriate means to investigate and improve my practice and clarify my values as living educational standards of practice (Whitehead, 1999).

Investigating the nature of my educative influence

While clear definitions are not easy to find in leadership and human relations and often not even very useful, another of my purposes in analyzing these two case studies is to examine and analyze how I influence people. I recognize that ‘influence’ is a complex subject:

Whereas simple concepts are typically open to crisp definition, complex concepts are usually defined vaguely (Leithwood, et. al, 1999, p. 6).

It is mostly through other people that I get the tasks done that are required to manage systems and improve student learning. If I couldn't influence people then, I couldn't do my job.

'Most definitions of leadership', Yukl claimed, 'reflect the assumption that it involves a social influence process whereby intentional influence is exerted by one person [or group] over other people [or groups] to structure the activities and relationships in a group or organization' (1994: 3). Influence, then, seems to be a necessary part of most conceptions of leadership. This suggests that most of the variances in leadership concepts, types or models can be accounted for by differences in who exerts influence, the nature of that influence, the purpose for the exercise of influence and its outcomes (Leithwood et al, 1999, p. 6).

Clarifying the nature of my educative influence as a senior administrator is essential to my study as I seek answers to the question, 'How can I improve my practice?' As I said to Greg Buckles, principal,

...what I'm trying to turn, find, or uncover is my capacity to influence. And, what does it look like, how does it work? How do I get things done? And, then how can I get better at getting things done? (transcript of conversation with Greg Buckles, February, 1999, p. 1).

I want to show the nature of my educative influence and my living standards of practice which are the values that I hold myself accountable for in my daily life and work. They are *living* because they emerge in the living of my life according to the values that I hold to be true and at the same time changing and refining as a result of life's experiences. I am in agreement with Susan and Thomas Kuczarski

(1995), “that values stem over time from four factors: 1) family and childhood experiences, 2) conflict events which evoke self-discovery, 3) major life changes and experiential learning, and 4) personal relationships with ‘important’ individuals” (p. 43). The process of researching my practice has driven me to bore into the depths of my being to uncover and discover what I stand for and who I am, to reveal my ontology. It has been an unrelenting poking and probing to find understanding and explanation for my values. Those standards are confirmed or denied in critical incidents (Whitehead, 1993; McNiff et. al., 1996, p. 41). “New insights which manifest as ‘Aha!’ experiences are often actually insights that we gradually become aware of and then wonder why it took so long to see the obvious” (McNiff, 2000a, p.8).

Critical incidents can be transformatory events when they evoke anger, feelings of violation and at the other end of the continuum, moments of real joy and pleasure. Reflecting on incidents that elicit strong emotion forces me to confirm my adherence to my values or to see myself as a living contradiction not living my values as fully as I would like (Whitehead, 1989). These critical incidents are frequently painful and I respond by wanting to deny my actions or the response of others to my actions. Over the course of researching my practice by addressing questions like, “How do I improve my practice?” I have become more capable of facing these incidents for all that they can teach me so that I can improve. I see *improvement*, much like Dewey’s preferred expression, “growth” (Ryan, 1995), as a positive force although I recognize, and must remind myself, that others may see it from a deficit perspective. It seems to me that educators are in the improvement business.

Because my responses to critical incidents are both cognitive and emotional, they can provide opportunities for my learning and improvement. Much of the research on leadership has focused only on the cognitive and behavioural aspects with researchers looking for models and frameworks to understand the world of the educational administrator (Leithwood et al., 1999).⁴ While I find it difficult to define my meaning

⁴ See Chapter 4.

of “emotions”, those “pesky interlopers” (Beatty, 2002), the stories in this chapter and in Chapter Four clarify my relationships and emotional leadership. Drawing on Denzin’s (1984) definition, Beatty (2002) says that emotions

...reference truths, or feelings that are deeply felt by the person – truths, that is, that touch the heart. In this sense...they lie at the inner core of the moral person. ...their meanings must be revealed to the self so that the self becomes attached to them. In this way the person is connected...is established through the interpretations that individuals give to their emotional experiences. Emotionality connects the person to society (p. 85)(p.2).

As an emerging leader, I learned to practice “emotional labour” (Hochschild, 1983 in Beatty, 2000) and to recognize that:

“The hierarchical relationship between reason and emotion has particular implications for life in organizations—for leaders and for followers—in that it is often played out as one of mutual exclusion...that same is synonymous with unemotional is re-enacted continually” (Beatty, 2000, p. 334).

Brenda Beatty (2000) found in her research that the emotional side of the leader is usually ignored. “Indeed, the emotional causes and effects of so many conditions, to which a leader may deliberately or inadvertently contribute, remain under-explored, while the emotional processes of the leader her/himself remain virtually uncharted territory” (p.333). Fortunately, the work of Noddings (1984), Gilligan (1982) and Shakeshaft (1995)⁵ and others supports what I have learned over time and through experience - that subverting emotions may be antithetical to being an effective leader through caring, connecting, relating and valuing the other in professional practice.

⁵ See Chapter 4.

Working With Greg and Cheryl

In the following studies in singularity (Bassey, 1995) or case studies, I study in depth my relationship with two staff with whom I have worked intensively over a period of time and who have been willing collaborators. Greg Buckles was an elementary school principal in my family of schools where I did have a direct supervisory role and Cheryl Black was a secondary school teacher and then vice-principal with whom I did not have a supervisory role. With each of these stories I describe and explain who they are and how we have worked together. In each case in an iterative process I have shared the story with them and asked them to respond in terms of the accuracy of the story and of how they can validate or clarify it by adding anecdotes or elaboration. In many cases I have asked specific questions, in particular, about how I have influenced them and if they are able to track that influence to the improvement of student learning. I am hoping that you will see my educative influence on them and they on me in reciprocal learning and growth and the passion that we share for students and learning.



Greg Buckles, elementary school principal-extraordinaire, now retired. A friend with strongly-held values and great integrity. I have known Greg for 15 years.

My Work with Greg Buckles, Principal

As I reviewed the story Greg wrote of his life as a principal (Buckles, 1997), our e-mails over four years, the transcripts of the Pauline Johnson Family of Schools' meetings, his School Improvement Plans and our transcribed conversations, I began to see our influence on each other, our reciprocal learning, and the standards I use to judge my own performance.

At time of the final writing of my thesis, Greg has retired from the principal position and I miss his influence and our relationship. On the validity of a single case as representative of a known cohort, I agree with Erben (1998) that "although no two

teachers [or principals] will be exactly alike, it is unlikely that they will not echo common themes and concerns in relation to the demands of an established curriculum” (Jardine, 1992; Rampazi, 1996) (p. 6). I do not intend Greg simply to be representative but his life as a principal and our relationship can stand as an example to describe and explain my relationship with principals, my learning in that capacity and my educative influence on them. I have shared this story with him at many points along the way and he is completely comfortable with it (Buckles e-mail August 27, 2001).

First, let me give some background on our relationship and experiences. Greg was an elementary school principal whom I had known for more than fifteen years. Our relationship had built over those years while we had each held a variety of positions in the Brant board and grown stronger as we worked together intensively during 1995-2000. An exemplary principal, he is a large man, a football player in his youth, has a wonderful earthy laugh and cares passionately about children in a calm, caring and respectful way. When he was posted to his last school, there had been many problems with relationships with parents; after he arrived, there were few. He had amazing skills in listening and building relationships with a whole variety of people: “Your capacity to step into the shoes of the teacher helps her to unload the hurt.” (DeLong, J., e-mail 11/11/98). Greg was loved and admired by his peers, superiors, teachers, students and parents. Even as I talk about him I feel his warmth and strength of character.

I wish in an internal dialogical way to substantiate some of these claims to an educative relationship, to demonstrate to the reader that in a critical way I am aware of the issues and am reflecting on them. I recognize that there is so much in this study about relational ways of knowing and that when I say that ‘Greg was loved and admired’, that it will cause some readers discomfort. Let me say that I recognize that there are difficulties in communicating the meanings in educative relations that are articulated in Bataille’s (1962) work on eroticism and the erotico-spiritual energy that was part of the way in which Greg and I worked together and learned from each other.

Integrity oozed from his pores. When the teachers and principals went on strike for two weeks in October, 1997⁶, he was one of the few who did not join the picket line. Principals did not have the legal right to strike (even though at the time they were members of the teachers' federation) and it was contrary to his values not to go to work. While others who crossed the picket line were criticized and even threatened, I never heard any criticism of Greg either during or after the strike because everyone understood that he lived according to his strongly-held values.

When Greg first joined the Pauline Johnson (PJ) Family of Schools where I was the superintendent he said that he hoped that I would help him improve his knowledge of curriculum so that he could become a better curriculum leader. Two years later he was regarded not only in the PJ Family but also across the system as a leader in curriculum and assessment. It seemed like a fairly simple formula: I provided the support and opportunities and Greg worked at learning the new skill or strategy, improved his practice in his school and then shared his knowledge with the system.

Whenever I introduced an opportunity to try something new that might improve student learning, Greg would volunteer and I knew that he would give the project his best effort. In terms of assessing directions for principals in the family, I used Greg as a test. In an e-mail, I said, "Whenever I'd heard about complaints that I was pushing principals to be curriculum leaders, I'd check back with you to see if I was expecting too much. I'd say to myself, 'If Greg can do this, so can the rest.' Was that fair? Maybe not; because you are so committed." **One of the criticisms of me is that I hold unreasonably high expectations and this may be evidence.** During the years, 1997-99, his school was involved in many innovative projects such as a provincial research project on playground activities, Television Ontario's pilot program called 'Galaxy' and action research compensatory education projects.

⁶ See Chapter 1.

He provided leadership in many projects, committees and organizations in Brant County and then in Grand Erie including the implementation of the new School Councils for Brant and the School Leadership Program:

When the time came that I could put together a team to plan and implement a school leadership program I knew that I needed your interpersonal skills not only on the team but also shared with the new administrators. Because of the importance of the task ahead in finding leaders for our schools given the number who have or are planning to retire, I requested that I be able to pull together the team I needed. Your name was on the list. Administrative Council approved my list. And, fortunately, you agreed (DeLong e-mail 11/11/98).

Another area of our shared experiences was integrating research-based professionalism into the school-planning process. In my role as superintendent, I encouraged, supported and approved the writing and implementing of school plans for improvement in all the schools in the family. Greg was quick to learn and implement the school planning process. After he learned the action research process, he then took the school planning to a new level by incorporating the research process into the school planning process. In particular, he incorporated the means to answer the questions I frequently asked him and his colleagues: "How are we improving student learning? How do we know? What is the evidence?" Because of his values, credibility and accomplishments, he influenced his colleagues to follow his lead.⁷ His school was an exemplar for the board because it served a low socio-economic population and yet in 1999 had one of the highest grade three test scores in the board and two of his teachers won Prime Minister's Science and Technology awards. Visionary principals, like Greg, have proven to be instrumental in improving test scores (Dean, 2000).

At each monthly family of schools meetings, I planned professional development sessions on curriculum and assessment that would be led by principals in the family

⁷ When asked to respond to this case study, principals in the system affirmed this statement.

and curriculum support staff. As follow-up support for the learning, I committed a large proportion of the family of schools' contingency budget to the curriculum area that we identified as the focus for that year. My intention was that I took on the responsibility of ensuring that principals had professional development sessions where they could acquire the knowledge, skills and confidence to teach their staff and to recognize good practice when they saw it in classrooms. Their responsibility was to learn, pass on the knowledge and ensure that it was happening in the classrooms. The following excerpt from a conversation between us gives evidence of my educative influence on Greg, to *uncover my capacity to influence* (transcript of conversation with Greg Buckles, February, 1999, p. 1), that affected learning in classrooms and of our reciprocal learning. Again, I will include my reflections in comic font.

Greg: Well, what about the early literacy program. I mean, we have talked about the parameters, and you set the parameters for that. You came out with that one sheet, "Here's what I expect" and so on. We met with our staff; we worked with the action research project. You were part of the in-service on action research. So you shared there, directly with staff. That whole project now goes down to the classroom level. So what teachers are looking for, what they are writing down, what they are observing has all been influenced by what you have taught in terms of what action research is and the process of action research. They have taken it to the point to where now they implement that; they implement their program and they do it within the model of action research; they bring their information and their stories and their comments back together and now we can see that what we have done has or has not had an influence on our kids. Even if it hasn't, it doesn't matter because now we know that that's not the route to go. What we are attempting to establish in our dialogue is that my educative influence is evident in the work of Greg influencing the practice of his teachers who in turn influence the improved learning of their students. This is always a difficult path to trace when I am not in direct contact with children in classrooms. My influence is indirect through my 'valuing the other' relationship with Greg.

Jackie: Right, for sure.

Greg: So we can change our practice and we can be assured that this isn't going to work with our kids. Now what that means is that now we're not wasting our time. On the positive sense, if it works, and a certain aspect of it worked or modifications of it worked, we now know that. Now, where did this all originate? Yes, the board gave us an allotted amount of money but it was through you as a superintendent that you created the criteria for the use of that money. With input, obviously. You've been part of the process to train, you've been part of the process to work with principals on the action research and then now, you've put the trust in your people to follow through and bringing that down to the classroom level. It was so affirming that Greg could see how I was building that culture of inquiry and reflection and providing the supports so teachers could conduct the research on their practice and trusting principals to follow through (transcription of conversation, Feb. 1999).

When I invited principals to join a group who would be researching their own practice in an initiative funded by the Ontario Public School Teachers' Federation⁸, he immediately volunteered. Over the course of the 1996-97 school year, Greg worked with five other principals to research his life as a principal. It was very hard work for Greg but he persisted, never missed a session, and his story, "Greg's Story" (Buckles, 1997), is part of "Voices of Principals" (DeLong, 1999). He talked about how I had been unwilling to provide a structure and specific direction when they started their research and writing and how in the long run that had been a better way to hear their voices. Because of this and other experiences, since then I have changed my support for action research processes by giving more guidance through framework questions: part of my improvement in my practice as a result of working with Greg and others. My reason for changing was that I thought some guidelines, not prescriptions, would reduce for others the degree of struggle that Greg had experienced. He talked too about how the process had made him more reflective and more confident having collected the data and having written about his practice.

⁸ See Chapter 3B.

After Greg wrote his story for "Voices of Principals", I wrote a response to his story. I talked to him about the fact that through his willingness to take a risk he encouraged others to try too: he became a role model for many of his colleagues as well as staff and students. The transcripts of the meetings show Greg's struggle with writing about his practice. (Greg confirmed this in the Feb., 1999 transcript, p.15). I remember several occasions when he wondered if he could do it and if I had suggestions that would make it easier for him to complete the task. I suggested that he tape his thoughts and I would arrange to get them transcribed. He followed this suggestion to start and then as his confidence in writing grew, he didn't need the taping anymore.

In the following rather lengthy passage transcribed from our February meeting we are reviewing his writing. I include my reflections on my educative influence and my value of valuing the other. It is interesting that over three years later, I can still hear Greg's voice and feel his warmth.

Jackie: There are a couple of points that I noted on that second page (of his writing). In the second paragraph, you said, "Your support and encouragement have motivated me to a large extent in doing what I felt over the past few years." A recurring theme of my faith in others' capacities that motivates them. I wonder if you can articulate what that looks like.

Greg: Okay, I think the whole business of action research is...I know when it was first brought to my attention, of course you know, "Oh really?"

Jackie: (I laugh) You volunteered, Greg. I have definitively said that I will never make action research mandatory. The participants have to come willingly and be allowed to leave if they want. In the "Voices of Principals" project, one principal did leave, with no recriminations.

Greg: I know I did. I know I did. I think you have to look at me and my personality in terms of this whole scenario too, because I am the kind of person that, even though I'm not accepting of the first thing that comes off of the truck, I will look and I will make sure, but I feel that I am also sensible enough to have a good look at it. So, even though I am thinking what's in it for me? I still will look at it because I hate it when

somebody says, "That's a terrible idea" and they haven't even looked at it. That's not fair. So, when I originally looked at it, I began to see, "Well, this looks good." I have always said that we don't have enough data to prove our point and yet, I've always been schooled in data being the kind of data you get with a control group and so on, you know, the clinical type data. And yet, we're not clinicians, we're practitioners. So, how do you get that data? So this is what intrigued me. And yet, even though I've been through and I am convinced that certainly the data is valid data, I still find it difficult to get other people to realize that this is valid and practical data that you can use. Certainly there is ...you can't use a formula on it and take it to the level of significance with statistics, but you have good solid data and, let's face it, if you go on in education, you begin to realize that that data is just as valid if not more valid than some of the clinical data that comes out of the university. The point that you were making last night. One of the hardest ideas to get across to practitioners is that their knowing is real knowledge. They go back to their positivist experiences at university, to the 'real data'. I feel that only through doing the research do they learn this way of knowing. So, that's where I'm coming from.

So, what did you do there? Well, number one, you provided the opportunity and I think that is really important. First of all, what you did for me is you showed me what action research was all about. Now, you didn't do that perhaps, directly, I mean you brought in Jack Whitehead, you brought in all of these other folks; we sat at King George with Ruth McNiff? Here my influence is in bringing in the experts to work with the staff.

Jackie: Jean

Greg: Jean McNiff. I got a lot out of that session; a lot of questions were answered. I'd done some reading, you provided me with the material, okay, you didn't push me but you provided me with the material. In other words, you knew how to throw the hook and if you want to use that analogy (Maybe it's a poor one) you were able to put out the carrot and I was able to jump after the carrot because I'm looking for the carrot. Now, if I didn't like the taste of the carrot, I would certainly have backed off but because of the fact that I did like that and I did like what I saw, that's why I

pursued it. Now, in anything, I know what you tend to do is to provide a tremendous amount of opportunity. I open the doors and people choose whether they want to enter or not. Greg chose to enter. And when he did I demonstrated that I cared about him and provided the supports. There's BARN,⁹ there's this group, there's that group and so on. What I have to do is be selective in terms of here's the amount of time I can spend, and here's what I think really pertains to me. That's why the action research in my school, is, to me, of primary importance. This whole business of the role of the principal (reference here to the six principals that I supported to research their practice) that was great because I really needed to understand what it was. I really did and I needed to collect some data on how I did what I did and why I did what I did and perhaps how I can improve what I do. Did he get the essence of action research? Great! When it came to the actual filtering to the school level, with the early literacy, I thought, this was great because now it's not just personal, it becomes something that is good for kids and that's what I felt I was all about. I had started this focus on early literacy in compensatory education schools in the board with a budget for resources and in-service for staff and an expectation of researching the strategy that they chose to improve literacy and Greg's school was one of those schools. Since this was a low socio-economic community where teachers and the principal were investigating their practice to improve the learning of the children, Susan Noffke's (1997) claim that living educational theory cannot address issues of power and privilege is negated. The school reports provide evidence not only of Greg's growing knowledge and confidence in researching his practice and of his ability to support his teachers to research their own but also of addressing issues of power and privilege. Here is a section from the Woodman-Cainsville School Early Literacy Action Research Report:

The project undertaken this year has proven to be of benefit to students. Definite gains were made by teaching specific reading strategies and using materials from a variety of disciplines. Our students were able to become more independent readers. Our assessment techniques have

⁹ See Chapter 3B.

provided us with additional data to more accurately identify student strengths and weaknesses. The research project has enabled us to evaluate our reading program and make necessary changes and improvements in its delivery. We feel that our accountability towards improving student learning and providing appropriate programming for students is enhanced through action research. We have also been able to identify areas where improvement in program delivery is necessary and will take the steps to address this. (Buckles et al., 1999).

Greg: Perhaps, that's what I learned or had re-emphasized to me through the role of the principal research project. So that's what I saw. Like when I take a look at the comment, "Your support and encouragement have motivated me to a large extent in doing what I have done over the past few years." (Buckles e-mail, 1998) Because you were there and you made me think, you asked me questions, you did not push this on me, all right? You gave me an opportunity and certainly put things out there that would make it well worth my while to pursue and I'm thinking in terms of the early literacy. The money was there. You could have said so easily, "Okay, (to all of us) here's \$3,000.00 per school; just write up something and tell me what you are doing." That would have been so much easier you know? It would have been. When you start to think about accountability, the business that we are in, does it not make more sense to say, "You set out a plan and you set out an objective that you want to accomplish and then you tell me, at the end of that objective whether it was good enough for kids?" I was showing Greg in words and actions that I valued him and saw his potential to make a difference in the lives of students and teachers. There's a big difference because I could have just gone and taken the money and just bought a bunch of materials but that wasn't the point. The point is you wanted a program and you wanted something that was good for kids. In his words are my words about being accountable and having evidence that a program improves learning and not just throwing money at something without the accountability. So, we ran and worked in conjunction with the other groups and it worked out nicely. Now, having gone through that for two years, I think what I would like to do, if I was here, see you never

finish, what I'd like to see the person who takes over the school do, is to say, "Okay, let's look at another question." I am finding that once a second cycle of researching is completed, it becomes the regular practice of the person and with a much deeper understanding. One project doesn't institutionalize the process. At an action research project session on January 18, 2002, Joanne Finch, a grade 8 teacher in her second project said, "I was losing momentum and feeling that I'd lost the point of my research when I realized that the research was about improving myself!" The other finding of note is that generally in a second project researchers get deeper into their values and experience some discomfort with the realization that they are living contradictions (Whitehead, 1989), that is, not living their values fully in their practice (conversation with Diane Morgan, April 17, 2002 as she read this). Our question has basically been, 'Has the guided reading program been good for kids?' and this year we've expanded that to some additional readings in the science and technology and history and geography areas, too. So that we can see if there is any co-relation there. What I'd like to do is, possibly, although the guided reading does have its strengths, I'm looking for something else too, because we have lots of parent volunteers and it's really hard to get them in. We're finding that, although the guided reading is an excellent program and we will continue with it, it will be part of our practice. We'd like to supplement it with something that's structured. Clearly evidence of the action-reflection spiral and next questions. (Whitehead, 1989; McNiff, 1992).

Jackie: Are you talking about All Star (a reading program)?

Greg: I don't know. With All Star you need a high degree of parent involvement. There may be something else out there, I don't know. But you can see what it's doing. Here he's reflecting on his own reflections and posing his own questions without my asking them. It's getting us to say, "Okay, we've looked at this and we know the benefits of this guided reading program and we know it'll work under these conditions, but we also have some kids with some difficulties attending and focussing. And how do we deal with them?" Do we use alternate programs for them? Do we look at a more structured program for the class and maybe the kids that are doing well, have alternate programs for them? How do we manage that? I think those are

questions that we need to take a look at over the next while for I can see us continually benefiting from that kind of budget assistance and the action research format.

Jackie: You might want to look at last Monday's board meeting and The Early Literacy Review Report because that actually has some of the suggestions that you might be looking for in it. I can't release this yet but there will be some direction coming in this. I had reported to the board on a system review I had conducted of early literacy programs across the board and made some recommendations. Here I was showing him the way ahead in terms of policy directions and making the connections - this is part of my influence in helping people make connections.

Greg: Good, good.

Jackie: The point I want to make is that the research that you've done, that Ruth [Mills]¹⁰ presented to the early literacy committee, had been folded into the directions of the board for the future and the difference between that report and some of the others is we had our own data from our own kids and our own teachers in our own classrooms. That really resonated with the committee. I felt a real confidence about the program and where it worked and where it didn't because of the research we'd done, which in the past hasn't been there and that means going to the board and saying, "Give me money because it is a good thing to do to help early literacy." I can't do that anymore. I have to be able to say, "This is how we are using it and this is how we know it works for kids." I'm celebrating and valuing Greg's work and the staff's work so that he and they see the benefits not only to the students in his school but across the system and their influence on policy decision-making.

Greg: I think our staff need to know that too. He made the connection. They have to realize that the money just is not out there and available. If indeed they want to access money for programs, then you have to have a plan in place... But no, that's where I see the support. I know full well that if I can come to you and, you know, I try not to. I try to deal with it within my own building but, and with the funding that I have but, I

¹⁰ See Chapter 3B.

know full well that I'd say to you, "Jackie, I would like some additional supply time for my two grade three teachers to do this, this and this with respect to early literacy", I know I'll get that. Now I don't take advantage of that. I think I've done that maybe once or twice but I know it is there. Okay? So, when I say support, you know, I can count on you for not just the financial support but also the moral support and this is one of the things I think is important to me. If I am sort of wedging my way through a new area, I really need the support. Because of the strength of our relationship, he knows that I will give money and moral support for him and his teachers to research programs that improve student learning and I know that he will be accountable. You know, I've mentioned in here that I was an opportunist in the sense that I spread my bread on the incoming water and that's true. I'm not a real risk taker although some people may think I am. I really have to have my facts straight before I forge ahead. Now, I don't have to know the thing 100%, I realize that but I have to feel comfortable and I need enough information so that I feel comfortable to move ahead. Now you seem to match that very nicely and that's why I think we work well together because I think you and I think alike in a lot of ways. But, by the same token, I believe that you know me well enough that 1) you're not overwhelming me with stuff. You're giving me enough, you're showing me opportunities, you're letting me choose and then when I need the help and support, you are there. Because I know I could call you and even if you weren't here, within a day or so I'd have an answer back. Now I know if the way things are today that the timeline is obviously going to increase to a certain degree because of the size of responsibility but at least I know that it is coming. Notice how many times he says he 'knows.' I feel that that trust comes from demonstrating that I am who I say I am and acting accordingly over a period of time and with many common experiences. I think that is very important to me because if I didn't get the support and I had some questions, I would tend to slow down. This issue of support is one of knowing intuitively how much is needed and when. I would maybe try a few things but then if I ran into a roadblock and I wasn't comfortable with the direction then I tend to back off and wait. I find that you give me that support. I think that a significant error in implementation of a change is the lack of sustained support because every change

process experiences an implementation dip (Fullan, 1992) and if you aren't there to provide the support in the bad times, the change will lose its momentum. *You give me just enough to keep me going ahead. Great!*

Jackie: It's interesting because Cheryl said the same thing when I was coaching her through the action research process, almost the exact same words.¹¹ You might think that we are just talking but when I start to hear some of the same things then I've got some validation of some of the items in here. So, it helps to listen to you talk. I'm learning about how to support practitioners doing research and hearing the same themes and patterns.

Greg: That's important. To me it's important and obviously to the other person, it was important and I think that is a good quality that you have, that you tend to read people well enough (and I don't know if you do this with everyone) but certainly with me you read me well enough to know when to intervene and when not to. And there are sometimes I know I've been into roadblocks and you've kind of just let me think, going back to [writing about] the role of the principal. You have that period of confusion and for some that's a longer period. With me, with this particular role of the principal, I still was confused for quite some time. I wanted to bring out his own voice in his own way and had to force myself to trust that he would find his way. Timing is an important skill in teaching and with adult learners, I think even more important.

Jackie: Probably seemed longer than it was.

Greg: And then I took hold and identified what it really was we were after, and I know all of us were in the same boat. It was nice to have the group because we were talking back and forth. Greg recognizes that critical friends and a supportive environment provide the safe environment to take a risk. This was part of my learning that I used in the design of the masters cohort program. It was an excellent exercise in clarification and you would not tell us what it was we had to do. I know that drove some of us round the bend. You know, like "Jackie, what do you want?" And you would say something to the effect, "Well, think about what this is about. Think about a plan that you might have; think about what you do; think about your

story." Note that he repeats my use of 'think' four times. I am always encouraging that inquiry and reflection mode in staff and students. It is my firm belief that clear, creative and critical thinking can bring improved learning for all members of the community. *In the back of our minds we're saying, "To heck with the story, tell us what you want." No, no, no. What you are doing.... I guess all of us tend to work around a framework and the framework, this is what is expected, now fill in the details. Yet, what you were doing, was just the opposite. You were saying, "I'm not going to give you anything, you look at what you do, you look at your story and from that you extrapolate the framework."* Since that early experience I find that I am providing more suggestions in the forms of questions to be answered in the action research process but I still push them to look inside and at their own practice.

Jackie: Exactly

Greg: And that's what you were working on. Well, under the stresses and everyday conditions, we don't think that way, we really don't. Maybe we should, maybe we should be more reflective on what we do. And I think really, if we slowed down and thought a little more about what we did and how we can improve what we do, we'd work a lot less hard, smarter but not harder. Thomas Homer-Dixon (2000) calls this The Ingenuity Gap. So, that's where I can see that kind of stuff coming out. You were there to support, I'm sure that when you turned around you probably had a lot of paper thrown at you at that session. But by the same token, it really got us to think.

Jackie: Well the other thing is too, that I've learned through these processes how to do a better job of asking the right questions and giving support. What I know now, what I didn't know then was that one of the major keys is to get people to write a short story and then get the dialogue from that and see how the process comes out of it. That's a pretty important discovery, which to my knowledge, none of the other people who coach or teach action research has used. So, if I were doing it today, I would do it slightly differently. There was also the assumption that I knew the answers -- which I didn't. I think this kind of open dialogue of sharing learning, our reciprocal learning, provides evidence of the breakdown of the hierarchical to a more democratic form of relational leadership.

¹¹ See later in this chapter.

Greg: You didn't, no.

Jackie: Because, everybody had to find their own process and you are right, the learning comes out of the process of the writing and the thinking and the talking which is a different way of learning.

Greg: Yes, it really is. You know what really was the turning point for me was that experience that you sat in on with Mrs. S. and the teacher. Besides supporting my principal in a difficult situation, I was able to help him see his knowledge of the role of the principal. You asked me to write that up and I wrote it up and as I was writing it up, I was thinking to myself, this is just a normal thing here yet, after I wrote it up and analyzed what I did, I was thinking, "I found some things here." You know, nothing spectacular but the revelation was the sense that, "Oh look at the skills that I'm using but look at how I'm using them. Greg was close to having that real confidence of his way of knowing and I wanted to make sure it was solidly embedded.

"Greg's Story" (Buckles, 1997) shows very clearly his commitment to treating people whatever their age or position with respect and caring about them and their needs. He talked about preferring the face to face conversations to written and telephone conversations. The skill of listening, an essential skill for building relationships, is a frequent theme in that he showed he cared about people by listening. One of his staff members said, "I don't always get the answer I want but I feel you listen and we can constructively discuss the issues" (Buckles, 1997). He talked frequently about being positive and using a problem-solving model. I believe strongly that school leadership is for leaders with positive attitudes (Dean, 2000). At the Grand Erie Administrators' Retreat on April 9, 1999, Peter Moffatt said, "As leaders in your schools and communities, you carry the hope."

I could see Greg's problem-solving process as one of careful and complete investigation through gathering and analyzing data, listening with empathy and looking for a win-win solution. That capacity to see and feel events from the other perspective and to suspend judgment is captured in "Everyone believes that their

issues or concerns are important and I try to listen and respond to these concerns in the best way I can. My door is open to students, staff and parents" (Buckles, 1997).

That capacity to diffuse situations and de-escalate conflict is evident in his description of his response when a parent made inflammatory comments, "I didn't react at that point. I just simply let it go by..." (Buckles, 1997). 'Simply' doesn't quite capture the significance of this statement. If I could learn to *just simply let it go by*, I'd have far fewer conflict situations. Not easy to do. By letting the parents share their concerns and frustrations, they reveal deeper problems that they will share only when they trust you.

As I reflect on this study I see the recurring themes of my valuing the other, our reciprocal learning and my improvement in my practice of supporting principals to improve student learning. When I talked to Greg about his way of being an effective principal, I was affirming and articulating my own values around leadership and shaping my own professional identity (Connelly & Clandinin, 1999). While I was responding to Greg, I was learning about myself.

The difficulty you and most others who have that natural talent with people have is that you don't always recognize what you do that creates those relationships. I believe that recording and analyzing your life as a principal and sharing and writing your story has helped you understand how you do what you do. It has helped you teach others. It has also helped me think about my relationship with you and other principals and pushed me to analyze what works in relationships (e-mail to Greg, 1999).

"I will summarize the points I made in my answer to the question, What have I learned from you, Greg?

You inspire me with your tremendous capacity to make people feel valued

You confirm my belief that principals can be and must be curriculum leaders.

Clearly you start from the foundation of building the relationship first.

You inspire me because of your solid values-base.

You teach me that superintendents can work collaboratively with principals and that we can learn so much from each other. I've always felt that we've worked together as colleagues, never as people in a hierarchy.

You've taught me about diffusing situations, about listening and caring, about the value of consummate patience.

You reinforce my belief that real relationships cannot exist without trust. The trust we have has been built over time and through a variety of experiences. From my standpoint, it has never been at risk.

You made me feel valued. Even in what some principals might have seen as threatening situation, you said, "It was good that the superintendent was there as well because she was able to share some perceptions as to why the parent reacted as she did. Throughout this discussion the teacher became a little less anxious and felt a little more comfortable about the whole situation. Above all, we should not be taking what the parent was saying personally. It was good sound advice that actually comforted the teacher." (Buckles, 1999) Even superintendents need to feel that they are making a difference in the lives of students, teachers and, yes, principals.

(DeLong, e-mail 11/11/98).

Observing my work with Greg and others, I see that the roles of teacher and learner flow back and forth. When I was teaching Greg about curriculum and assessment and action research, I was the teacher; when he was working with the family of schools' principals and parents, I was the student, learning about building relationships. It even happened simultaneously in that when I was teaching Greg about action research, I was learning about how to support others conducting research on their practice: what to do and what not to do. An example of this was around helping him get his thoughts on paper. **This kind of educative relationship between principal and superintendent changes the traditional power relationship as we are learners together in a less hierarchical and more collaborative relationship.** This is what I think I mean by

reciprocal learning and I think helps to explain my non-hierarchical view of the world in that I want to improve my practice and can learn from and with anyone, no matter the age or position.

As I have been reliving this experience with Greg, I hope I am communicating to you, the reader, in a “readerly text” not just a “writerly text” (Mellett, 2000) and valuing you as the other. This study of singularity (Bassey, 1995) gives a clear picture of the role of dialogue in my relational leadership and in my learning as I think and learn through dialogue. **I feel and wish to communicate the emotional warmth I feel in reviewing and reflecting on my work with Greg. In fact, I re-live and am present in that experience each time I read it and reflect on it. Having the photo of Greg on the page evokes physical, spiritual and emotional sensations to enhance the immediacy, vivacity and vitality of the experience. As I work with principals and support staff in my daily work, this embodied knowledge, this unfolding bodymind (Hocking et al., 2001), springs visually and emotionally to my view and regularly informs my ontology, epistemology and practice.**

The second study of singularity (Bassey, 1995) is that of my friend, colleague, and co-researcher, Cheryl.

Cheryl Black, Teacher/Vice-Principal

Cheryl Black, teacher and vice-principal, is an individual I have influenced and who has validated that claim. In this introduction I share evidence of my recent influence and an example early in our relationship. I begin with her recent clear explanation of standards which she says emerged from having read one of the earlier versions of my standards (DeLong, 2001a). From her final paper for the Reflective Practice masters’ course that Susan Drake and I taught in the fall term of 2000:

My standards of practice would be different than the standards of any



Cheryl Black, friend, colleague, aspiring principal, leader, Action Research leader, superior classroom teacher for 20 years, co-researcher. I have known Cheryl for 21 years.

other person because every person is a different combination of values. That is what makes each of us unique. Therefore, if my standards were based on my values, then my standards are just that, mine! The ability to show that my values are evident in my

practice and, the knowledge that they make a difference in student learning, will go a long way in helping me define my role as an administrator (Black, 2000).

During the early years of my research, Cheryl was a secondary school teacher who taught Music, both vocal and instrumental. In September 2000, she was appointed elementary school vice-principal. Now I will go back to those early years to an e-mail that I received when she had completed a draft of her first action research project. It was upsetting to me that this was how a competent, caring, committed teacher felt about how her work was valued by the public—"stress and uncertainty". It still makes me feel sad and angry that she would feel that way but also pleased that I was able to provide the supports she needed to feel pride in her work and confidence in her personal philosophy.

Jackie,

Here it [her first action research project] is for what it is worth. Please be ruthless. If there is anything I need to change or adjust please let me know.

I'm also curious as to what (if anything) I would have to change in order to have my presentation accredited. It is very affirming, in this time of stress and uncertainty to have something of which I can be proud.

Thank you for your guidance and support which allowed me to validate my personal philosophy. (my emphasis) I affirmed and valued her knowledge and expertise. Not many people have the opportunity to collect evidence, to prove to themselves and others their reason for becoming a teacher.

Sincerely,

Cheryl

(May, 1998).

How did our relationship come about?

In this second case study, or “study of singularity” (Bassey, 1995, p.109), I think another aspect of my influence is revealed in my educative relationship with Cheryl. It is important to note that since she worked in a school in an area of the school district that was not in my family of schools, I had no supervisory role with her. I recognize that the role of superintendent carries a power with it regardless and while there probably were issues of positional power in our relationship in the early years, they dissipated with our deepening relationship. Cheryl and I have known each other for 20 years but have worked together more intensively during the last five years (1997-2002), first as I taught her action research and then with her growing competence and confidence, as she taught others and we became co-researchers. As with Greg, this study emerged in an iterative process of writing and dialogue as we both grew in our understanding of our lives as professional educators.

With the writing of this second case study, I began (July, 1998) by writing a brief description of my thoughts and feelings as I watched an experienced and exciting secondary school music teacher, Cheryl, present her first action research project to a group of teachers on June 11, 1998. I have to this day a very clear and delightful image of the energy and excitement of this event. To that kernel of the case study I added the context of where our relationship had begun, focusing on the 1997-98 school year. Much to my chagrin, I also attempted to apply the draft standards of practice released by the Ontario College of Teachers (OCT, 1998) to the life of this teacher as I have observed her and as she has reflected on her own life. Then I asked her to apply them to me. A classic example of living contradiction (Whitehead, 1989)! You will see that we eventually saw the madness of this (DeLong & Whitehead, 1998). On many occasions (August, 1998 to April, 2002) I have asked Cheryl for reactions and responses to the study as to its accuracy and as to evidence she might provide to substantiate the claims that I was making about how I thought I had influenced her. With the words of Pam Lomax, former professor at Kingston University, UK, ringing in my ears, "I know of no administrator who has been able to show evidence that she improves student learning", I really pushed my research to see if I could find any evidence that, through Cheryl's work in the classroom, I had affected students' learning (conversation at AERA Annual Meeting, New York, 1996).

In the beginning of our relationship I was the teacher, mentor and advisor; in time, we became friends. "We are well aware of the importance of mentoring today, but the line between mentor and friend is evanescent. Friends guide and learn from each other, especially in unexplored terrain (Bateson, 1989, p.103). Through many workshops, meetings and e-mail conversations as time went on, I began to see that it wasn't just a matter of my influencing her; she was very clearly influencing me. Then I asked her if she would apply the OCT Standards to my work. We soon came to the realization that we were becoming critical friends, not teacher and superintendent. This "critical event" (Whitehead, 1993; McNiff, 2000) occurred on November 14, 1998 as we developed a paper proposal for the International Conference on Teacher Research, (ICTR) 1999: 'How can we, as teacher and superintendent, improve our practice by

assessing our influence on each other in our roles as educational leaders and critical friends?' (Black & Delong, 1999).

On December 4, 1998, I submitted an initial paper "Seeking an Understanding of Influence" which included this case study, to my validation group just prior to the annual conference of the Ontario Educational Research Council for response. That group included: Jack Whitehead as chair, Dr. Linda Grant, Ontario College of Teachers (OCT) Manager of Standards of Practice, Dr. Frances Squire, OCT Project Coordinator, Dr. Ron Wideman, Assistant Professor Nipissing University, Peter Moffatt, Director of Education, and Cheryl Black, teacher. I have incorporated their suggestions for improvement in this chapter and in the thesis.

Cheryl and her first action research project

Back to 1997-98. When Cheryl first indicated to me that she was interested in conducting an action research project, I was excited by the prospect because I had worked directly with only one other secondary school teacher, James Ellsworth (Ellsworth, 1997), curriculum consultant working with me in Career Education. She was the first secondary teacher who had come entirely of her own volition to do action research and with whom I had no direct supervisory influence. The issue of undue influence because of position is certainly a variable in assessing influence. When I asked Cheryl if she had engaged in this because of my power position, her response was that she had engaged because of a combination of workshops by Peter Rasokas, principal, and I, and by Jack Whitehead, her performance review that year and because of my enthusiasm. She said:

I believe that power doesn't necessarily go with the title; it often is based on the perceptions of people. I think positive power is more closely related to respect. The opinion of someone I respect is worth much more than someone in a position of authority that I do not respect (that's where I was going when I told you that your position was not

the reason I got involved with action research; it was you personally)

(Black, e-mail Sept. 20, 1998).

While this does not remove the position power as an issue, Cheryl confirms that she chose this direction because of our relationship, my influence as a person, not because of my position. We discussed this issue many times over the years and I think you will see in the evolution of our relationship that our voices had equal time and importance in our lives and in our joint papers (Black & Delong, 1999, 2000).

I want to share the process of her completion of her first Action Research Project. I had known Cheryl since 1981 when I had been teaching in the same school (after my return to teaching after a period of eight years at home raising my two children) and she was in her first year of teaching. From that first encounter and to this day I find her to be a very positive, fun-loving, creative person and very student-focused. So when I was informed that she had expressed an interest in conducting her own action research project, I was very pleased. Cheryl says that one time I said to her that if she was interested in starting an action research project that she should give me a call. So she called me and I visited her in her crowded music office. She seemed surprised that I would be available personally to spend time with her. **Taking time and paying attention is demonstrating my valuing her and her knowledge.**

I remember her very clear concerns about her students, her teaching and what the problems were that she wanted to research. I was well aware, as well, of her mixture of confidence and insecurity. **This insecurity is a recurring pattern in practitioner researchers and is reminiscent of the lack of confidence I had in my research process so I could identify with her feelings.**¹² When I asked her the source of this lack of confidence, she said:

I was uncertain as to the amount of extra work that I was creating for myself. Later I realized that since it was my project, it was up to me to

¹² See Chapter 5.

determine the amount and nature of the data collection (Black, e-mail Nov. 22, 1998).

I encouraged her to begin the process and we talked about some of the data that she could collect as she implemented her project to build student self-esteem in her classroom and about the supports she could access.

I explained to her that I was planning a number of support activities for action researchers including Brant Action Research Network (BARN) which would meet once a month after-school as well as release-time workshop sessions on topics ranging from data collection and analysis to writing the report. This issue of sustained support is an important one for me.¹³ There have been many examples of initiatives in education that have been one day or one year events and not processes supported over the long term that teachers become cynical. I did not want to be guilty of that insensitivity, **that lack of valuing the other**. Cheryl picked this up:

During my work experience with Jackie, she has gone beyond the expectations of her role in her positive reinforcement and professional support (Black, e-mail Sept 11, 1998).

I asked her about finding a critical friend and she indicated that the board music consultant, Kathy, had agreed to take that role. Over the 1997-98 school year we met at workshops and sharing sessions and she was a regular at all the opportunities to learn and share. I always looked forward to hearing her thoughts and progress. She shared her enjoyment of the process (**and my valuing the other**) in a conversation with

¹³ See Chapter 3B.

Jack Whitehead at one of the meetings:

I love coming to these sessions because working on my project by myself I frequently felt that I wasn't doing anything that any caring teacher wouldn't do. At the sessions, Jackie asks the right questions to give me more direction and finds ways to affirm that what I was doing was worthwhile. One of the ways was asking me to describe my project to Astrid (School Board Trustee).¹⁴ That helped me share what was important to me and her enthusiasm helped me feel affirmed. I talked about the fact that conducting action research gave me 'emotional resilience' and she wrote it down. That meant something because she seemed interested in my emotional wellbeing as a teacher. And Jack said, 'I've just come from AERA and I didn't hear one presentation as exciting as yours'. That was the best birthday present that I ever got. What a gift! (Black, transcript of conversation, August 18, 1998, p. 5)

That need for affirmation is in all of us but being affirmed encourages and inspires very capable people like Cheryl to grow and reach higher.

Over the year, Elaine MacAskill, curriculum consultant, and I planned, facilitated and presented a variety of action research sessions to provide sustained support for the staff doing their own research. The sessions were a combination of release-time (supply teachers provided) and after school sessions on topics such as 'Framing the Question', 'Gathering and Analysing Data', 'Writing the Report' and opportunities to talk and share their learning. Cheryl said:

Creating a forum for exchange of ideas shows professionals that their ideas are worthwhile. As a classroom teacher, it is too easy to work in a vacuum and lose sight of the fact that reacting to a perceived need in your class is a positive act. It is one thing to know in your head that

you are making a difference but the validation of another professional, one whom you respect, can help you believe in your heart that what you are doing is important. My valuing her work encouraged her faith in herself (Black, e-mail, Sept 9, 1998).

In these sessions, my intention was to get them started and then fade into the background so they could learn from each other. While I had the understanding of the process, they were the practitioners who knew their lives in their classrooms with their students and I wanted to hear their voices. Cheryl said:

Positive educative influence looks like you. Yes, that's what I want to be -positive educative influence! Every time I think of you while the group members were sharing their respective projects, you were smiling and giving the speaker your complete attention. That alone is a positive experience for a teacher. This is power and position used in positive ways. Every meeting with just me or with a group, you asked us the question, "How can I help you?" or, "What would you like me to do for you?" I am encouraging inquiry and reflection with my personal support. You showed us that you respected our opinion and trusted our experience by allowing us to choose your means of helping us. The fact that you acted more as a facilitator than as a didactic teacher meant that we were trusted professionals. In a supportive environment built on trust, professionalism and reflection can thrive and flourish.

A more didactic approach of telling us the information at workshops would not add to our belief in our own ability. We would have still felt that your validation of our work was the only viable one and we would remain dependent on your opinion of our work. Developing confidence in our own ideas and encouraging us to discuss and collaborate with a critical friend was a beginning of new habits which would have a far

¹⁴ See Chapter 1.

greater impact on the remainder of our teaching careers. Like the commercial, "Give a man a fish and you feed him for a day, Teach him to fish and you feed him for life (Black, e-mail, Aug 17, 1998).

Also, I tried to help new staff like Elaine MacAskill become the leaders of the action research support processes. I was, however, always there to provide sustained support. Cheryl observed that,

As Elaine gained more confidence in the process, Jackie validated her process by allowing Elaine more responsibility for planning and guiding the workshops and increasing her leadership opportunities (Black, e-mail, Aug 17, 1998).

Then came time for Cheryl to share her action research project in a sharing session. I can visualize this picture of Cheryl with a radiant smile and in a purple suit (that she had made herself) presenting her action research project to the BARN meeting on June 11, 1998 to a group of fifteen teachers and curriculum staff. She presented her story in a series of overheads with stories to illustrate her findings. Her oral and body language clearly conveyed her thorough enjoyment in teaching students (Black, transcript, June 11, 1998).

While she intended to improve the self-confidence of her students, ironically one of the outcomes of the project was new faith in her own abilities: "Believing that I am respected for my ability and knowledge is a rare feeling. Action Research gives credence to my knowledge and experience" (Black, 1998. p. 1). The perception of the public is often that teachers avoid accountability. Here was Cheryl delighted that, "No longer do I have to rely on vague, nebulous feelings of improvement when the proof is in the writing" (Black, 1998, p. 1). She helped us visualize her problem and made us laugh as she role-played the slouching teenager and his surly tone as he said, "I'm not singing, I wanted Tech and they stuck me here" (Black, 1998. p. 1).

After Cheryl presented her report on her project, several people in the group responded to her with commendations and thoughtful questions as to where she might go next. One of the group was a curriculum consultant from the Cayuga Office of the new board who had not met Cheryl before. She asked Cheryl to present her project to a group of secondary teachers in her area. **Cheryl was getting the recognition from her peers that she deserved and I saw her extending her knowledge to other teachers so that their practice and the learning of their students might improve. Research-based professionalism was becoming part of the knowledge base of teaching and learning.**

In terms of demonstrating growth through her performance review, Professional Growth Strand (PGS), Cheryl's school principal commented in the report:

Ms. Black is to be commended for the effort she put into her PGS this year. She is truly a reflective practitioner. Her efforts made a "difference for kids" and by sharing her work with other teachers, she continues her efforts to make music classes and schools in general, a better place for our students (Wibberley, June, 1998).

Moreover, Cheryl's first study became part of the knowledge base of teaching and learning through her workshop sessions in the board for Queens' University on November 11, 1998, at the Ontario Educational Research Conference on December 4, 1998 in Toronto, in the Ontario Action Researcher electronic journal. (Delong & Wideman, 1998-2002) and at the International Conference for Teacher Researchers, 1999 in Quebec. As she was extending her influence through her work, so was I.

As I heard her delight in her learning and improved teaching, I knew one more time why I invest so much time and energy into supporting teachers to research their practice. "I guess this whole process has been very affirming for me" (transcript of

meeting, Aug 18, 1998, p.16). With an eye ever to the future, I hoped also that I might have supported another action researcher who would teach others research-based professionalism and contribute to a creating a culture of inquiry, reflection and scholarship.¹⁵

Next Steps and Validation

At our August 18, 1998 meeting, we talked about her teaching other researchers, about further work on her project and about her interest in administration. She said that in order to teach action research in her school, she would have to be sensitive to the political climate of low teacher morale and dissatisfaction with the government¹⁶ and consider whether to talk with the entire school staff or just work with one or two interested teachers. We talked about places in her report where there might be some claims that she could substantiate from her data archive and in each case she could cite where that data would be. I asked probing questions around whether she wanted to continue to work on the current topic and report or whether she preferred to start a new cycle of investigation with a new group of students having improved her strategy for helping to build self-esteem. Also she re-iterated her interest in pursuing advanced accreditation. At that time I was still working on that opportunity for her.¹⁷

On the topic of her interest in school administration, her response was in the negative but she might be interested in being a department head. We still laugh, given that a year later she was starting the principals' qualifications course and shortly after was appointed vice-principal. I am always pushing people to see their capacity to be and do more. I could see her potential to influence a wider setting and although she was not yet ready, the seed was planted.

¹⁵ See Chapter 3B.

¹⁶ See Chapter 1.

¹⁷ See Chapter 3B.

We also talked about connections between my work with her and her work with the students and about how I could improve the process I had used with her and the BARN group.

Jackie: If you were to look back over this year and your experience in this, how could I do it better? I want to know how to better support teachers; this need for improvement is essential to my enjoyment of the world.

Cheryl: That's hard. I already mentioned that it was intuitive or luck or just the timing of each of the workshops was impeccable. It was just bang on for me personally. I don't know if other people have the same feeling.¹⁸ It was a little of both; my own research experience and paying attention to the needs of the group.

Jackie: I mean Elaine and I talked about it. Okay, now we've done this and we've done this, now it seems like this is sort of what we need next and so I mean it wasn't way ahead in advance planning. It was sort of almost one step at a time. As with the teaching of children, I start with where they are and take them the next step and Cheryl does the same.

Cheryl: Well then that's the same process that I went through with my students when every couple of weeks when I would say it's time for another journalling activity or they would ask, "We haven't used our books lately"; then I would sort of think about where and what kinds of things had happened at the school lately and what kind of issues they were dealing with and then I would give them 3 or 4 questions to get them started and I was doing it one step at a time as I watched them and what they appeared to need or analyzed what they appeared to need. Notice how we move from our learning to students' learning with the same philosophy and approach. I liked the fact that we weren't inundated with information, that we were given what we needed, that we weren't allowed to get heavily into the theory so that we weren't scared off.

Jackie: It's interesting to hear the cycle because that's how he [Jack] taught me. I kept thinking I should be getting more theory; I need to be doing more reading and he kept saying, "Write, I want you to write. I want you to collect data." And then it was a long

time and all of a sudden the theory just came whoosh and I was reading 555 books.¹⁹ That's true. Note my penchant for exaggeration - it just seemed like that many. So I was actually using his model, as I taught you and Elaine and the others, that I've kept you away from the theory so that you don't think that somebody else has the answers. You actually have the answers and you just have to find them within your own writing and thinking. As with Greg, I believe in her knowledge and I want her to value it too.

Cheryl: And so the discussion groups that we participated in, which you would take a, I don't say the word "stand-back" but you would initiate discussion and then let the discussion continue rather than guiding it --controlling is not a better word because you would guide it when it was needed but you never controlled. So I've always been fascinated by whether or not people can practice what they preach. So your values were inherent because you were working with us, now I lost my train. You treated us as professionals and your values were inherent because the process was so closely related to what you were communicating. Does that make sense?

Jackie: So what were some of the values you think I was communicating? I am looking for validation of what I think my values are.

Cheryl: Respect for our professionalism, respect for our experience and our intelligence and allowing us to see that in each other was an added level, as opposed to you telling us to see it, we saw it by virtue of the situation in which you place us. Definitely, love and respect for kids because you wouldn't be working with us, working as hard as you did with us if you didn't care about the end result which would be improved learning for kids. I think that she has validated my values of the valuing the other in professional practice and building a culture of inquiry, reflection and scholarship (transcript of conversation, August 18, 1998).

Cheryl: Network Leader and Year Two Researcher

¹⁸ See earlier in this chapter.

¹⁹ See Chapter 5.

I often get asked the question about how to keep action research going after initial successes. I think my sustained support for Cheryl and the networks addresses this. When I was planning the 1998-99 years' activities in action research in the Grand Erie District School Board with Diane Morgan²⁰, Program Coordinator, I asked her where I might find someone to continue the work I had begun in the Brant area since my expanded portfolio and the amalgamation tensions just would not allow for the same degree of involvement in BARN. **This is the transition from my work in Brant to our work in Grand Erie.** Diane offered to organize and facilitate the meetings but thought one of the practitioners from BARN should provide the leadership. We both thought Cheryl was the ideal person to do this. When Diane asked Cheryl if she would be willing to take this role (September 11, 1998), Cheryl asked me if I thought she could handle it (**again I had no doubt about her capacity and she did**) and I said, "I couldn't think of anyone more capable or appropriate." I believe that teachers learn best from their peers. She replied that she was encouraged by our confidence in her and agreed to do it.

During the 1998-99 school year, Cheryl continued her research cycle into a second year refining the self-esteem-building strategies in her classrooms as part of her regular practice. She also formulated a new question: "How can I live my values more fully in my classroom as I support teachers to use action research to improve their teaching and student learning?" (Black, Nov 22, 1998). **This second cycle, as I mentioned in Greg's story, is very important because the change to research-based professionalism then becomes more embedded in the practice.**

As I moved out into my new role, I had two very competent people, Diane and Cheryl, to continue the work I had begun in Brant and I could focus my energies on an expanded portfolio and a new family of schools²¹ while still maintaining my interest in the growth of action research in the Grand Erie District School Board. Part of my planning was that the action research movement in the district needed to have an

²⁰ See Chapter 3A.

²¹ See Chapter 3B.

identity that was separate from me and embodied in the world of classroom teachers and school administrators. My departure from the frontline leadership was well-timed for the future of the movement.

Cheryl and Jackie: Co-Researchers

In 1999, Cheryl and I worked every other Saturday morning from January to April in a combination of a six kilometre walk with her dog (appropriately named "Jazz") on the banks of the Grand River and on our joint research. Those days were consumed with dialogue and writing the International Conference on Teacher Research (ICTR) paper, my research and implementing and reviewing action research supports in the Grand Erie District School Board. The following excerpts from our ICTR paper, "Assessing Our Influence" (Black & Delong, 1999) describe the process.

STORY OF GRAND ERIE ACTION RESEARCH NETWORKS

Taking the Reins

Cheryl conducted an interest/needs survey about Action Research in the board in November. She found that there was interest in Action Research at a variety of levels of awareness. On Dec 1-3, 1998, Jack Whitehead, University of Bath, did awareness sessions in the three areas of the newly-amalgamated Grand Erie District School Board and at the School Leadership Program. As a structure to implement action research across the board, we decided to have three groups, one out of each support centre. So Brant Action Research Network (BARN) had existed for 4 years but Simcoe Action Research Team (SART) and Cayuga Action Research (CAR) were formed. We committed to follow-up sessions with each of the groups in January. Frustrations of working in the new board revolved around communication problems, unexpected changes in staff, labour unrest and perceived, and often unwelcome, changes in the way things were done. After what seemed like months of discussion with some other staff around what should be done, Jackie said, "Let's just do it." She encouraged

Cheryl to take the reins and get on with booking the room and sending out the invitations.

...

In the Brant Action Research Network (BARN) session, Cheryl based the process on questions, both hers and those of the participants.

Cheryl: On one occasion in the session I saw a face shut down when I gave the answer to one of their questions. Instead of encouraging them to solve their own problems, I took over... I actually did a [good] job of allowing them to take over in Cayuga and realized I did what Jackie did – ask questions so that they recognize what we were talking about –not tell, but just redirect or solidify thinking by asking questions. (transcript Jan 30/99 WT session).

What does sustained support look like?

From the beginning session in December, 1998 with Jack, the following supports have been provided:

- 1. Jack Whitehead conducted four sessions in the board to share his knowledge; copies of the Action Research Kit (DeLong & Wideman, 1998a,b,c) and You and Your Action Research Project (McNiff, Lomax & Whitehead, 1996) were provided to participants.*
- 2. January BARN session dedicated to getting started and to writing and developing a question.*
- 3. February BARN was a check-in session; Cheryl shared my perception of the January meeting and asked for validation of that perception; purpose was to set a model of the validation process, the writing process and including other voices in the writing. For those who missed the session, Cheryl sent out the paper with a description of the session and a request to come to the next session with some writing.*

4. *March BARN was another check-in with the expectation that they would bring some writing to the session; they read and responded to each other's work making comments on the writing; Cheryl referred to the phenomenological nod (Van Manen, 1990 p. 27) of recognition in the session. April will be a release time (out of system budgets) meeting with Jack Whitehead in which the teacher researchers will have the opportunity to dialogue with Jack.*
5. *Both CAR and SART have continued their meetings each month and the system budget has paid for dinner for the meetings.*
6. *Jackie purchased the Fall issue of Orbit (Vol.29, No. 3, 1998) for the three Action Research groups.*
7. *Cheryl and Peter Rasokas as editors will ask for submissions for a Grand Erie Action Research Book (that book came to fruition on December 6, 2001 at OERC with the help of Diane, Cheryl, James (DeLong, 2001b)²² as well as for the November issue of OAR (Ontario Action Researcher-Jackie and Ron Wideman editors). www.unipissing.ca/oar*
8. *Jackie's two groups- Covey AR Group and the Simcoe Office group- meet once a month and follow similar processes.*
9. *Two teachers and two principals were sponsored to attend ICTR and ten staff to the Act Reflect Revise conference out of system budgets.*
10. *The School Leadership Program has action research principles embedded in it through in-service with Jack and through the use of reflective journals and facilitated reflective dialogue.*

Stories of Ruin

We have found that we tend to remember only the successes and conveniently forget the problems and obstacles. So what "stories of ruin" (Lather, 1994 in MacLure, 1996), as Maggie MacLure calls them, have we experienced? At the initial BARN session with Jack there were twenty-two people, in January there were ten, February,

²² See Chapter 3.

four and March, five. The attrition rate each meeting was fifty percent. At SART, there were thirty-five in December with Jack and in January the numbers held but in February they declined to sixteen.

We are still investigating the reasons. Some people missed sessions because of breakdowns in communication systems in the new board-three different e-mail systems didn't talk to each other. Other factors included report card times, work overload, family and school commitment (Black & Delong, 1999).

Cheryl As Experienced Researcher and Vice-Principal

Since the presentation of that paper, I negotiated a Grand Erie-Brock partnership as described in Chapter Three (B) and Cheryl was one of the fifteen graduate students from the on-site cohort Masters program which commenced in September, 1999 and who graduated on October 20, 2001. **I watched with pride as the light blue and red hood was placed on her shoulders.** She completed the Principals' Course in 2000. In both programs, Cheryl's prior knowledge and experience with action research proved to be invaluable. At the first part of the principals' course in July, 1999, her presentation on action research was very well received and her practicum for the course was her question on supporting teachers to research their practice with action research. She has continued to support teachers in conducting action research projects and publish and share their findings. She presented with me at ICTR, 1999, in Magog, Quebec, in April, 2000 in Baton Rouge and attended the Annual Meetings of AERA 2001 in Seattle and 2002 in New Orleans.

In September, 2000 she made a dramatic change in career path and became an elementary vice-principal in Brier Park School where I had been principal six years earlier – a pleasant coincidence since I know some of the staff who are still there. In Chapter Two of her Masters Project, “Managing Transitions”, she said:

Two people influenced me at this point. First, Jackie Delong. Jackie is a superintendent with the Grand Erie District School Board and someone I met in my first year of teaching, in 1981. Years later, in my attempt to prepare for the possibility of department head in the arts, I took a leadership course sponsored by the school board and re-connected with Jackie. Through that course, I was introduced to the process of investigating my own practice through action research. As a result of her influence, I undertook my first action research project and subsequently, I was invited to be chair of the action research network. Jackie was also investigating her own practice and asked me to work with her. Then began two years of Saturday mornings around the kitchen table 'doing homework' like schoolgirls. I think this is indicative of the depth of our relationship and the valuing of each other. We read and discussed many books as part of our collaborative writing process. When Jackie came up with an idea that we should collaborate on a paper for ICTR – the International Conference on Teacher Research, she called and invited me to her office for a meeting.

During the discussion, Jackie asked, "Have you ever considered pursuing administration?"

"No. No not me. A department head maybe, of music or the arts, but never an administrator" (Transcript of conversation, August 18, 1998) (Black, 2001, p. 40).

Standards of Practice As Linguistic Checklists

Another related piece to this relationship is that as I was working with Fran Squire who was developing the Standards of Practice for the Ontario College of Teachers, I included Cheryl in the group of teachers working with Fran. We became familiar with the standards and decided to apply them to each other. I referred earlier to my being a "living contradiction" (Whitehead, 1989) here in that I had often voiced my concern

about the standards being tickboxes. The following is an excerpt from our work (Black & Delong, 1999):

Can the OCT Standards of Practice be used to assess Cheryl's life as teacher and researcher?

What I thought I would do is see if the draft standards could be used to assess Cheryl's work, as she conducted research on her own practice. The professional development standards revolve around "teachers committed to ongoing professional learning." (OCT, 1998). How does Cheryl demonstrate that she,

(a) understand[s] that professional learning is an integral part of teaching and is directly related to student learning? I have observed that Cheryl:

- *saw a problem in her teaching and set out systematically to solve it by asking the question, "How can I increase the self-esteem of my students so that they will take a more active role in their own learning?"*
- *listened to her students to learn how to teach them better:*

"So I decided to sit back and watch and as they entered the room they would come in groups and I gathered from the way they were talking and nudging and looking that they were angry and that a lot of them had filled out questionnaires and found out that it was based on the [relationships from the] feeder schools.....I came up with the conclusion that that problem of self-esteem was there and not a bad attitude towards learning." (Black, 1998-transcript of June 4 sharing session)

- *consulted with students, parents and teachers for understanding: She called the student's father to discover the root of the defiant behaviour (Black, 1998a, p.3).*
- *shared her learning to check for validation:*

At the BARN meeting where Cheryl shared her action research project, a teacher said:

"You were saying, too, that some of these changes could have or would have happened anyway? I don't know about that. I don't have secondary experience, mine is all elementary but I find that without interventions those kind of behaviours and the negativism will increase as the year goes on rather than decrease unless there is a teacher picking up on it and doing something about it like you did." (Black, June 4 Sharing Session, 1998).

(b) understand[s] that teaching is a dynamic, changing profession, responsive to personal, social and political contexts?

- adopted a new process, action research, as a means to improve professionally but recognized that the climate might not be optimal for engaging others during a work-to-rule sanction.*
- recognized that despite the political contexts, classrooms need to be safe places for teachers and students and that understanding group dynamics is essential to the teaching/learning process.*
- found that action research helped her articulate her values so that she could build stronger relationships in her classrooms. She became more resilient because external structures changed but internal ones remained consistent.*

(Black & Delong, 1998).

Cheryl clearly met the standard as one of the teachers "committed to professional learning." (OCT, 1998) I believe when they articulated the standards they must have been thinking of her. Even in the midst of a work-to-rule sanction, her professionalism shone through. What I am struck with, though, is that linguistic checklists like this cannot capture the magic and energy that Cheryl brings to her classroom and that her students share with her. There is an analogy to standardized testing in that the OCT Standards may serve as a useful tool as a starting point in a dialogue on performance indicators of effective teaching but not as a summative evaluation or measuring stick. Fran Squire's question on how we can make them regenerative and living is the salient one. (Squire, 1998). Given the direction of the OCT standards that "All members of the College should be able to "see" the work they do described in

these standards of practice" (OCT, 1998) narratives of the lives of teachers need to be produced to breathe life into the standards.

As I had applied the OCT Standards to Cheryl's life as a professional, she did the same with me. In the application, my influence on Cheryl's practice as well as on student learning was demonstrated.

Can the OCT Standards of Practice be used to assess Jackie's work as an educational leader?

As I had with Cheryl, Cheryl applied the OCT draft Standards of Practice to my work. I have selected a few sections from that work to cite. I want the reader to note that these are Cheryl's words as she reflected on how the standard might be applied to me. (Black, e-mail Sept. 9, 1998). Jackie demonstrates that she,

(a) understand[s] that professional learning is an integral part of teaching and is directly related to student learning

- *By encouraging me to participate in action research without being heavy-handed, you increased my professional learning thus improving my teaching ability.*
- *One of my peer tutors, Shannon, conducted an OAC independent study using a modified form of the action research process. This is recorded in my PGS. Shannon expressed enthusiasm that she was doing a project that was directly applicable to the class and not purely theoretical. She was excited about the quality of the responses to her survey questions: 'They took the time and made the effort to think about their responses just for me.' (Black, C. journal 1998)*

(b) understand[s] that teaching is a dynamic, changing profession, responsive to personal, social and political contexts

- *You introduced the process of Action Research which allows for independent research within a flexible framework thus allowing for various personal, social and political contexts.*

(c) *understand[s] that teaching practice is enhanced by many forms of knowledge, ways of knowing and ways to access that knowledge:*

- *You understand that individuals have their own way of approaching a problem and arriving at a solution. Many forms are necessary to meet the needs of varied individuals. Professional experience is valid knowledge and your willingness to be structured in your approach allowed for and acknowledged that experience. Thus, elementary classroom teachers, principals and secondary school teachers can adapt the method to suit their own special circumstances and each person learned the structure and then adapted it.*

(d) *draw[s] on and contribute[s] to various forms of educational research to improve their practice*

- *By encouraging me to present, you added to the number of people affected by my project and widened my circle of influence. That increased my interest in, and awareness of other educational research. Your workshop taught me what action research is and as well what it isn't.*

Jack and I reflected on these activities of Cheryl and I and on the danger in the standards as linguistic checklists when we wrote a paper for OERC 40th Annual Conference, Toronto, 4 Dec. 1998, Continuously regenerating developmental standards of practice in teacher education and an article for The Ontario Action Researcher from which I draw a section:

It is at this point we want to pause in order to focus on the central point of our paper. In the analysis below two experienced educators have unwittingly used the draft standards as external criteria which they have

'applied' to the stories of their professional learning. In accounting for their professional learning in terms of the 'general and abstract' standards of the College of Teachers the analyses below have lost some of important qualities of spontaneity and individualism which their whole stories contain as descriptions and explanations of their professional learning (Black, 1998). Most importantly, their analyses below in terms of the COT standards lose the spirit and creative energy of their love for education and their passion to enhance the quality of their pupils' learning.

It is important to stress that this analysis was carried out in good faith in the sense that there was no intention of denying the intentions of those who have worked so caringly and creatively at the College of Teachers on the standards of practice. What we want to stress is the importance of having a case-study collection of teachers' accounts of their professional learning to show how teachers own values and standards can be understood in an educative process of continuous regeneration and development (DeLong & Whitehead, 1998).

Improving Student Learning: We walk together in this.

The question that haunts me is: **'Is there any evidence that anything that I have done has helped to improve student learning?'** This is probably the most difficult question associated with my work. While I want to believe that what I do has an impact on the classroom and on student learning, I recognize that it is only through others that that can happen. When I work with teachers like Cheryl I am at least one step closer than when I try to influence principals in order to influence teachers who can influence students. And if the answer to the question is 'No', what is the meaning and purpose of my work? I believe and so does Cheryl that her action research has improved student learning and that she has gone this direction because of my influence.

As an example, Lindsay, Cheryl's student, conducted an Ontario Academic Credit (OAC) Independent Study project based on the action research process and presented her project in June 22, 2000 at the action research year-end celebration dinner in Simcoe. Her project was research on teaching music to grade four students. I believe that I can draw a line from my influence on Cheryl to the work of this student in that I taught Cheryl the action research process and the student learned and applied it through Cheryl's influence. The other piece of evidence of this connection is in the transcript of the visit of the Japanese professors: In the conversation between James Ellsworth²³ and the Japanese professors, Cheryl said:

We're partners in the learning process. As Andrea said, "we walk together in the learning process" rather than one leading and one following.

And Katie, a student said: I was just going to say, I think because Ms. Black asks our opinions, um on things that she is researching and that makes us feel really good because we feel valued that she asks us what we think about things that she is doing or things that she is doing in the class. And, then we feel that we're actually part of the class, and not just teaching us or doing it. (Transcription of visit, Dec 15, 1999) Note the language of the student reflecting my standard of valuing the other.

Part of Cheryl's way of being a professional is asking for feedback on how she is doing in democratic and non-hierarchical means of evaluation. **Again I believe that my influence can be seen in Cheryl's actions with her students and I am hoping that**

²³ See Chapter 3A.

you see the trail from me to Cheryl to her student, Holly. Professor Ikuta was seeing the culture I was trying to develop and support – learning together in positive relations. Holly was willing to be a part of Cheryl’s growth and learning. From Cheryl Black’s (1999) writing:

This October, in a class discussion, Holly said,

“In the grade nine class, you did the list, what your job is and what the student’s job is. And they were almost exactly the same other than the teaching and learning aspects of it. I think that really showed the grade nines that you value us and that you thought that we all should know how to treat each other and yourself. (Transcript Oct. 26, 1999). When the Japanese professors came to visit in December, 1999, Professor Ikuta said, “I learned how teachers develop their self along with the children. I want to learn how to do that.” (Lake, H. Simcoe Reformer, December 18, 1999).

In the conversation with the students and professors, Cheryl said, “We walk together in the learning process” (Philpot, C. Brantford Expositor, Dec, 18, 1999).

When Cheryl Black presented her paper “Valuing The Student Voice in Improving My Practice” at the Ontario Educational Research Council (OERC) on December 3, 1999, I felt my educative influence as she said, *“This group of students and I, are partners in the learning process and I now feel accountable to them for the quality of work I do.”* She was also submitting to democratic evaluation with her students and together they were creating an environment for sharing and learning:

Somewhere in the midst of our daily routine, my students have found the confidence to be honest with me, and, somewhere in the same place, I have found the courage to be honest with my students. We have all grown and been changed by our connections. Some might argue that the time we spend building relationships in our classroom would have

been better spent in more structured learning, however, Glasser(1993) believes that "the better we know someone and the more we like about what we know, the harder we will work for that person."(30) My students are demonstrating "conscience of membership".(Green, 1985) They are accountable to each other rather than only to me. In fact, they discipline and support themselves thus creating a partnership of learning rather than a 'teacher-down' approach. They have improved their singing ability and learned a great deal about music, in general. However, I maintain that the ability to build honest and healthy relationships is a skill that is only developed in unique circumstances and, it is impossible for either the teacher or the learner to remain unchanged (Black, 1999).



Cheryl Black, seen here in frames from a videotape of an interaction with a student shows the depth of caring and joy in their relationship. This clip from her research on her life in the classroom demonstrates the values she holds that are her standards of practice. Further, it provides evidence of my support of her research on her practice and my value as my standard of practice of the valuing the other in professional practice. Whether we think about emotional literacy in terms of my relationships with staff, family or here in Cheryl's rapport with her student, it is essential to take it into account as a value I hold. In this series of photos taken from a videoclip, a student in Cheryl's music classroom sees a bit of lint on Cheryl's jacket and feels sufficiently safe to thoughtfully remove it and cause that joyful expression seen on each of them. See that the student is still holding the emotion as the world moves on. Precious moment.

My Educative Influence in Stories of Greg and Cheryl

I refer again to "Truth is "born **between people** collectively searching for truth". (Bakhtin, 1963/1984a, p.110 in Coulter, 1999, p. 7). While these two case studies portray different personal, political and power relations, one where I have supervisory responsibility and one where I do not, the issues of power and privilege (Noffke, 1997) appear not to have the negative aspects usually associated with them and are issues that I have addressed to improve the social order (McNiff, 1992). I have engaged with those issues and feel that I have used those power-laden aspects of my position for good purposes in order to provide supports that will improve student learning. Not everyone agrees with my perspective, as you will see later in this chapter. The common patterns in the two stories are the relationships based on shared values and on commitments to make a difference and bring about improved student learning and a better social order (McNiff, 1992).

Of the vast numbers of relationships that I have within my role as superintendent there are many others that are similar and many that are very different, some very much polar opposites. I will share other narratives of significant professional relationships

that will as well demonstrate my standard of valuing the other in the descriptions of other aspects of the role. The facets of my educative relationships and the values that underpin them are captured in the list that I shared with the story of Greg. The feedback from Greg and Cheryl and others is helping me to create an image of my Circle of Influence (Covey, 1992).

Because I make a point of asking for responses as to how I am doing, I frequently get helpful information about my performance. Don Backus,²⁴ one of the leaders of the School Leadership Program, observed on reading some earlier writing that one aspect of my influence was time spent and support provided (meeting, Nov 25, 1998) and he cited his relationship with me and with Cheryl in that I spend time with individuals as well as groups despite a busy schedule and focus on and listen to each of them as if time were not an issue. Another result of asking for feedback is that the person reforms his/her thinking. When Cheryl read my thesis, it helped her see her own work in a different light:

I found that reading your papers caused me to remember things and think about other things in my project differently, so when I did this newer version [of her masters project], it was better as a result. I can't pinpoint exact references, it was the effect on my thinking that made my paper better, not concrete issues or quotes (Black, e-mail, Aug 13, 2001).

There is evidence of consistency over time with these two professional educators, Greg and Cheryl, of the way I am and how my value as standard of practice in valuing the other in professional practice determines my actions. I continue to work with Cheryl in the OERC Conference on December 6-7, 2001 and the book that she and I and Heather Knill-Griesser are planning for 2002. Greg is no longer here for me to talk to except in the e-mail from another part of the country. Also, Cheryl and I have become more friends than professional colleagues and that has made a difference.

²⁴ See Chapter 4.

They help me “To live with ambiguity, to challenge certainty, to creatively encounter, is to arrive, eventually, at ‘seeing’ anew.” (Simons, 1996 in Bassey, 1999, p. 238).

B) FAMILIES OF SCHOOLS

In this part of the chapter, I include my relationship with Kim Cottingham, a principal in my family of schools, my relationship with a parent and with a teacher, as well as my learning and improvement in holding myself accountable to my standards. The nature of the relationship between a superintendent and her principals is wrapped up in a number of issues, including personal and positional power. Because of my long-term relationship with Greg, I have used that “study of singularity” (Bassey, 1995) earlier in this chapter to fully describe and explain my relationship with principals, my learning in that capacity and my educative influence on them. My relationship with Kim in the next section will further elaborate on the qualities of that relationship as it relates to my work with my family of schools.

You will see how researching my practice has encouraged me to analyze and clarify my actions and intentions and is making me more aware of living standard of judgment of the valuing the other in professional practice. First, I will share the nature of the structure of a family of schools and the differences between the two families of schools.

The structure of a family of schools

A family of schools is basically an organizational structure to assign responsibilities to superintendents for the supervision of schools and principals. The jurisdiction of the board is divided more or less into equal divisions. For me it is much more than just an organizational structure because I feel a love and commitment to those teachers, children, families and communities for whom I hold responsibility. The principals and vice-principals and I also become a supportive, interdependent family who care about and learn from each other. Over the six years that I have been superintendent, I have

been assigned to two very different families of schools, named for the secondary schools in the area. The first, the Pauline Johnson (PJ) Family was in the Brant County Board of Education and the second, the Delhi, Simcoe, Sprucedale, Valley Heights and GELA Family, or as Keith Quigg named it, the JDFOS (Jackie Delong Family of Schools) was in the Grand Erie District School Board. I have chosen two principals as my touchstones to describe and explain my work in the families of schools for very different reasons. In Brant I came into the superintendency with credibility based on my teaching, federation and system and school leadership experience. When I joined that group, that image of my competency came with me. That is not to say that I wasn't challenged in my intentions or processes many times but I didn't need to start with a blank sheet establishing my ability or competence. There was an ease to relationships and I was part of the culture. Greg Buckles and many others respected my work and trusted me.

The move to the Norfolk area in 1998 was the most challenging and demanding test of my leadership skills in the six years as superintendent. In the JDFOS, I did not start with a blank slate but with many negative perceptions. It was like starting over as a rookie teacher and a new group of students in September. There was a tension in meetings from a distrust of the new board and this new leader intent on takeover and 'Brantizing' them. I recognized that I would have to earn their respect over time together and there was no short cut. It was people like Kim Cottingham who had the respect of his peers, that once having had some time with me, gave me the support I needed. He was open to seeing the potential of creating a better school system from any of the former boards. Others followed him. I will always be grateful.

The Pauline Johnson Family of Schools

First, I'll share my experiences from January, 1995 to June, 1998 in the Pauline Johnson Family of Schools which included the alternative secondary school, a family of 5000 mostly inner city elementary and secondary students and over 2000 alternative, summer and night school and continuing education students. The majority

of the compensatory education schools in the board were in this family, Greg Buckles' family of schools.

When I was first appointed to the position of superintendent, I was very pleased with the appointment, for the opportunity to work on the senior management team with Peter Moffatt, Director,²⁵ and to have as my schools, the Pauline Johnson Family of Schools. I was ready for a new challenge; I respected my leader and I really cared about the inner city schools. I had started my teaching career as an English teacher at Pauline Johnson Collegiate and Vocational School, at the time a school of 1600 secondary school students. It was a rough and tumble world for a twenty-one-year old academic student with six weeks in the summer of teacher training – we were referred to as the 'six-week wonders'. In the first three months of teaching one academic and four non-academic classes, I thought alternately of going back to university and of being the best teacher these kids ever had. Well, I did neither. But I did come to understand that their world was very different from my own and that most of them weren't going to love Shakespeare. **I did learn that once I paid attention to their interests, not my own and showed them that I cared, the relationship improved and they paid more attention to what I wanted them to learn.** One of the advantages of my staying in the same community over many years is that I still see some of them, have been principal in the schools of their children and have seen some of them become teachers and principals in our school system. They taught me a great deal. **I take great pleasure now in helping these families, who taught me to be a teacher, to work with the schools so that their children can be successful in school and in life.**

I devoted a great deal of time to supporting principals and teachers and to planning effective family of schools' meetings. I truly enjoyed those monthly meetings and often had my friend and colleague, Curriculum Coordinator Diane Morgan,²⁶ working with them. The principals knew that I was researching my practice and five of them

²⁵ See Chapter 1.

²⁶ See Chapter 3A.

from my family and two from another were also engaged in action research.²⁷ I was always asking for assessment on how I was doing and for the last two of the three years that I was responsible for that family of schools, all of the meetings were taped and transcribed and many photos taken. **I was able to review the meetings to see if I was accomplishing what I intended in the development of the relationships that I believed were essential to building a community of learners.** I also asked one of the veteran principals to conduct a survey of my performance (Berry, 1996-98). In 1996, one piece of feedback from the family of schools' monthly meetings was that I talked too much at the meetings. This was completely contrary to my intention in that I wanted to create a community of learners based on interdependence (Covey, 1992), not dependence on me. With the transcript of taped meeting minutes, I was able to analyze the minutes and sure enough it was true. I worked on correcting that over the following meetings and have now incorporated that knowledge and skill into my practice. In addition, I would meet with principals like Greg Buckles individually to get input on my work (transcript of conversation with Greg - February 1999, p. 1).

Like my first year as a teacher, my first year as a superintendent was mostly about the principals and vice-principals teaching me to be a good superintendent and supporting them so they could support teachers and student learning. I have fond memories of those early days in the job and of the wonderful staff who work in those inner city schools and the troubled and amazingly positive families in the community. Even after I moved out of the family, Peter Moffatt wanted me to keep the Compensatory Education portfolio because he knew of my passion for their needs. One of the benefits of the provincial testing of student achievement is that the test data is clear evidence of the need for extra resources for these children. (Delong & Moffatt, 1999 - 2001).

And now to my second family of schools starting in September, 1998, six months into amalgamation.

²⁷ See Chapter 3B.

The Delhi, Simcoe, Sprucedale, Valley Heights, Grand Erie Learning Alternatives (GELA) Family of Schools (JDFOS)

The second family of schools, the Delhi, Simcoe, Sprucedale, Valley Heights, Grand Erie Learning Alternatives (GELA) Family of Schools (JDFOS) – 7000 elementary and secondary students and over 2000 night, summer school and continuing education students.

When the three boards, Brant, Haldimand and Norfolk, were amalgamated, Norfolk was the most reluctant partner in the new organization. All of my schools except Grand Erie Learning Alternatives (GELA) were from the former Norfolk board. Peter wanted to get some movement across former boundaries and so I swapped families with Wayne Thomas. Coming from ‘big bad Brant’, there was no welcoming mat. I recognized that being accepted would test all my capacities but I did not know the full extent of that test. It was like moving to a new board, a board that wanted an insider as their leader but an outsider was hired. Since the new funding formula was not designed for elementary schools under 350 and secondary schools under 950 and most of mine met neither of the criteria, one of my first tasks was to conduct a study on closing small schools. **This was not a good recipe for gaining acceptance and I experienced a real sense of loss having developed the close relationships in the PJ Family and now being regarded as an outsider.**

The first year was very difficult. It was hard to find a kind face. I held public meetings in which I shared the data on the funding and small schools situation. After four or five of these, I recognized that all the data and charts in the world were not going to change the minds in the small communities. They would not support closing of their schools. However, if a choice had to be made, the choice was to close the elementary school and keep the secondary school open. Not a perfect solution but a solution all the same. In three years I had the dubious distinction of closing four elementary

schools and two more targetted for closure. I would not have been able to bring about those closures without the support and initiative of the principals and particularly, Kim Cottingham and Roy Mills, well-respected principals, a rookie and a veteran. Because of the data-sharing meetings, the communities are more aware of the seriousness of the problem that the government has handed us in its economic rationalist policies and we are more capable of meeting budget restrictions. Still, most of the public supports these economic policies until they affect them personally.



Kim Cottingham, principal, Port Rowan. I've known Kim since amalgamation of the boards in 1998. This is from the EIC video, August 1999.

Fortunately, there were a few friendly faces. Early in the days of the new board I was chair of an interview panel selecting new principals. The panel interviewed Kim Cottingham in what he agrees was not a stellar performance. In the post-interview I spent time reviewing with him what I felt he needed to do to get appointed in the Grand Erie District School Board. I could see no indication that he understood what I was saying or that he would follow my suggestions until I pushed him on what he cared about. Then I saw the passion, the fire in his eyes. He did understand and he would take my advice. **He said that it was the first time in his career that anyone had spent any time with him honestly telling him what he needed to do to improve.** In the Education Improvement Commission video (Griffith & Delong, 2000), he was eloquent in his praise for the leadership and career development programs that I had developed in the board²⁸. Because of his preparation, the next time that he applied, he was appointed.

As we have moved through the closing of two of his schools in 2000-2001, he has been the consummate relational leader (Regan & Brooks, 1995). There have been many difficulties with unhappy community members but he has helped them move on

²⁸ See Chapter 4.

(e-mails, Feb 11, 19, 2001). He researched his practice during the 2000-2001 year; it is an amazing story of his learning. The interesting thing here is that we are as different as day and night in personality. He is quiet and reserved; I'm dialogic and extroverted. **The bond of our relationship has come from the fact that we share the same values: kids come first and parents are our partners. When we meet, there is a warmth that is palpable.**

Part of building a supportive community in the family was coming to understand what was important to them. I negotiated the format of my family of schools meetings with the principals, asking them to determine time, chair, agenda items, Professional Development (PD) sessions. They wanted it divided into three parts: secondary school principals and vice-principals, elementary and secondary together for common issues and PD and then elementary only. Because of my reflective and problem-solving nature and desire to continuously improve, I frequently check on assumptions about how our relationship is going. One meeting when there were few agenda items for the secondary part of the meeting, I tried to shorten the length. That was not popular because the open dialogue was important to them. When I found vice-principals were not attending and this had been past practice, I provided supply teachers so that they could attend. I saw their attendance as essential to their training to be principals. **It was very important to me that they develop the relationships and feel part of the team.**

I believe that rigid hierarchical organizations mitigate against strong personal relationships built on trust. "Relationships therefore depend much more on cooperation than on control. Cooperation, in turn, depends on trust" (Stewart, 2001). One of my clear intentions in my work with teachers and principals is to build a more democratic environment in which each individual is valued for who they are as opposed to what



As part of building that community, I held an annual social the week before the school year began. Here are John Verbakel, Tom Kleven, Bill Clendinning, Roy Mills, me, and Kim Cottingham on August 27, 2001.

position they hold. Aligned with my valuing the other through non-hierarchical and democratic forms of evaluation, each year I conducted a survey on my performance. Four months into the first year, 1998, the results were very negative and the relationship was not good. After I shared that evaluation²⁹ with them, several of them called me to say that that opinion was not the dominant one but I still knew that all was not well on the home front. I was very upset and asked Peter Moffatt what he thought I should do. He said that I should give it another year and then worry. By the second year, the relationships were much improved. I wasn't from Norfolk but they'd adopted me. Three years later, like the PJ family, the monthly meeting was the highlight of my month and I looked forward to seeing the group which now felt like a family sharing ideas, experiences and depending on and caring for each other. My performance review for 2000-2001 by the family was very positive. "Jackie Delong had a full plate this year with a number of hot issues (assessment, communications and school consolidation/accommodation). There were also an increasing number of administrative changes. She is clearly seen as a very effective Superintendent" (Mills, 2001).

Kim Cottingham was one of a group of six principals in the family who conducted an action research project as their performance review process. The Action Research Team (ART) met every month after the Family of Schools' meeting and shared their writing and research. It was an enjoyable hour for sharing. This process has worked for six principals in two family of schools (Denton, Cottingham, Chambers, Cronkwright, Quigg, Rasokas,) have completed a very professional growth model of improving their practice. At time of writing, one more review is in progress and because of retirements and job changes, two others will not be completed.

Kim's action research project, "How Can I Improve My Effectiveness as a Leader in the Change Process?" (Cottingham, 2001)³⁰ shows his growing understanding of his life as a principal in a demanding situation of closing two schools and creating a new

²⁹ See Chapter 4.

³⁰ See Chapter 4.

one. He relates how I have supported him in his actions and learning and prompted him to include the voices of the parents and staff to validate his claims to know and understand his life. A weakness in the narrative is that it appears that there is now a state of Camelot in Port Rowan and he and I know that is not the case. We have discussed an important next step in the story for him to include future potential problems. Peter Moffatt shared some of Kim's story at the board meeting on June 26, 2001 saying that he was very impressed with the quality of his actions and reflections and recommended that the trustees read it. Kim reveals a view of the politics of working with trustees and communities that many people do not see and sees the humour in that "the Board Room is the driest place on the planet" (Cottingham, 2001). Based on his study of his practice, he shares some thoughts on leadership (my underlining):

The experiences of the past two years have served to confirm many of my beliefs about leadership and provided me with a framework to challenge those beliefs. Most significantly, I have come to understand that leadership is not based on a particular set of strategies but, is instead, founded in guiding principles and a set of values. If I had organized a particular set of strategies to supervise the amalgamation of three schools in the summer of 2000, I would have been doomed to frustration, conflict and confusion. By leading from a vision and a circle of influence instead, it is possible to shift gears and sometimes redirect into unfamiliar domains.

This experience and the process of regular critical review have been strengthening for me as a leader. Regular discussions with fellow principals and Jackie Delong have helped me to develop new characteristics as a leader. I am intending to create that professional dialogue that provides support amongst the group of school administrators and not just dependent on me. I believe the most important characteristic developed is one of personal confidence. I have led this process my way and have been encouraged to do so. Bonnie

Church, my vice-principal, has acted as my critical friend keeping me on track and confirming my views. I had a deep and caring relationship with both Kim and Bonnie and saw them supporting each other through difficult times.

*Throughout the experience I appreciate having been led in an affirming way. I have felt trusted and empowered. I have also felt that mistakes are allowed and they can often be the source of new directions. That's what I hope for. **And so do I!** As a leader I try to exemplify those characteristics. It is my hope that these pages show that leadership is a combination of commitment, knowledge and flexibility, that leadership is as much about the people being led as it is about the leader.*

Kim presented his project at the OERC Conference December 6-7, 2001 and is submitting it to The Ontario Action Researcher electronic journal www.unipissing.ca/oar. I have talked with Kim in the interim about continuing his study and sharing with the reader the "stories of ruin." (Lather in MacLure, 1996). When I think of Kim's story, I remember Joseph Campbell's (1949) work on the journey of the hero:

Where we had thought to travel outward, we will come to the center of our own existence. And where we had thought to be alone, we will be with all the world (p. 25).

Despite the fact that I am the supervisor for the principals and vice-principals in the families, I try to break down the hierarchical structure. Some, like Kim and Greg, are more comfortable with that than others. When there is a performance issue, as there was in two cases in the PJ Family, that power position becomes more prominent. In each case I was able to keep the evaluation on an informal professional growth model of evaluation but improvement was an expectation and not an option. In both cases I asked them to use a reflective process not unlike action research, to set

their own goals for improvement and gather data to show that it had occurred. Both improved and I was able to put it behind them. However, one was not able to sustain the improvement, faced formal review later after I had left the family and ultimately retired. **Whether principal or teacher, I always start from the standpoint of “How can I help you to improve?” The improvement is essential but the I-You (Buber, 1923) relationship must survive.** However, there also may come a time in performance review where I must recommend contract termination. During my life as a superintendent, I have recommended the termination of two teachers, one in the PJ family and one in the JDFOS but never for a principal. Not a pleasant part of the job, but sometimes necessary.

I hold principals in high regard and know that if I want to influence the teaching and learning in the schools, I need to build a strong relationships with them so that I can influence them. I see my role as keeping unnecessary obstacles out of their way, providing resources and supports and encouraging them so that they can do the important work of assisting teachers, parents and students to reach their expectations and achievement goals. I also look to see my influence in their work. That link can be seen in the work of one of the secondary principals who was part of the Action Research Team group conducting action research as their performance review process. John Verbakel used the strategy of writing narrative that he had learned from his own action research project with his staff at the April 30, 2001 staff meeting:

The purpose of this exercise is as follows:

- I. We all have many positive stories to tell about the teaching/learning experience. These stories don't get “out there” often enough. This is one way to get those stories “celebrated”*
- II. Our focus is on literacy. What better way to empathize with our students than to go through the writing experience with them? For many of you who don't often get the chance to write, it will be an experience.*

Now I wish to review a relationship with a parent in the PJ family of schools that will serve to show how I build relationships with parents.

My relationship with a parent

In order to understand the complexity of the life of a superintendent, I need to tell a story of my work with Michael, Michael's Dad, and Michael's³¹ principal as I delve more deeply into a story of working with a parent on the issue of his child being retained in a grade. This situation looks simple at first but much more complex on examination. "The sixty-three studies that define retention as pernicious practice to hold a child in a grade when his peers move on" (Holmes and Matthews, 1984, p. 232 in Coulter, 1999, p. 5; Smink, 2001) should make this a simple case but other variables come into play: a number of significant relationships must be preserved given the politics and individual rights of the players. While the research is useful, it is only useful to a point (DeLong & Moffatt, 2002).

This is the story of Michael, age thirteen, and the events and issues that I worked through with Michael's father. The principal called me in my office and requested a meeting to discuss a conflict with parents over promotion of their son to grade eight. They wanted him retained in grade seven. On arrival in her office, the principal showed me a copy of the Michael's grade seven report card. The marks were mediocre except for Math, which was a failing grade. She had promoted him to grade eight and from an objective viewpoint, I concurred. She had had several discussions with the parents and the father, in particular, insisted that his son remain in grade seven for another year. In the father's opinion, the boy had been "pushed on" to the next grade in the past with similar marks and it was time that he be failed in order to catch up. He was adamant.

³¹ I have anonymized the names because I did not ask permission to use their real names.

I asked the principal what suggestions she had given the father and she said that she had talked to him about the dangers of retention: damage to self-esteem, short term not long-term gains, loss of peer group, boredom with repetition of strong subject areas and loss of interest in school. She also talked to him about other options to failing the whole grade: grade eight with timetable to include grade seven math or grade eight with resource teacher support. None of these options appealed to him. Another problem with retention in this situation was the fact that remaining in grade seven would mean a third year with the same teacher. She had suspicions that the teacher had overridden her decision. I said that I thought that she had covered the issues and options with the father very well. The principal asked if I would give it a try with the father. I said that I would.

I called the father on his cell phone. I listened to him talk about what he wanted for his son and his concerns around his continuing learning problems. He said that he was certain that doing the grade seven work again would build his skills so that the boy would be better prepared to deal with the demands of high school in another year's time. I asked him if he would like to hear my advice on the issue and he agreed. I reviewed with him many of the same points that principal had conveyed. I asked him how his son was feeling about his peers moving onto grade eight and his staying behind. He said that his son was in agreement and that he frequently played with the younger children.

Listening to him talk, I felt that he was quite immovable on the issue and would consider no other route. I said to him that I was giving him my best advice and what I would do in like circumstances with my own son. He said that he appreciated my advice and efforts on his son's behalf but he had not changed his mind at all. I asked him if he would sign a form saying that it was his decision and contrary to the advice of the principal. He said that he was quite willing to do that. I followed up by saying that I hoped that we would both, parents and school staff, continue to work together to help his son be successful.

Then the principal and I discussed the conversation. I said that I was pleased with her commitment to bring this to closure despite the fact that the school year was over and this was taking her holiday time. Since she was being transferred to another school, I would send out the form and work with the new principal to see that additional assistance was provided to the boy. I also shared with her that by working with the family Michael might be successful (although the research does not support that). Even if dad spent more time with his son, there could be many benefits. We all know of exceptions to the rule. It was in the best interests of the child to work with the family. I recommended that she should put this aside and get on having a restful holiday.

Some extenuating circumstances

There were other issues that muddled the waters. To add to the complexity of the situation, this principal was experiencing performance problems. There had been many issues for which she had asked me to provide assistance - most having to do with poor relationships with parents. Recurring themes were: lack of trust, poor communication, incomplete investigation of behaviour incidents, lack of follow-up and reporting, lack of concern for student problems and injuries, superficial responses to concerns, poor community relations and lack of credibility with staff and community.

Earlier in the week, the principal and I had met to set her on a path to improvement through an informal supervision process called "In Transition". In that process, the staff member is to commit to a plan for improvement in a six to eight-week period. When we met, it appeared to come as no surprise to her and she had, in fact, known that she was not performing well and seemed to welcome the opportunity to get back on track. She was clearly upset but handled it very professionally. However, if there were not improvement in the time period, she would go on a formal "On Review" process which could lead to demotion or dismissal. **I clearly sent her the message**

that I cared about her and wanted the process to be helpful and aimed at improvement.

The father in this case was well aware of these concerns in the community. He was the chair of the School Council and Peter Moffatt, the Director, and I had met that group the month before. Our purpose for the meeting was to ask them for their priorities in the qualities of the incoming principal (since the current one had been placed in another school to give her a fresh start). Administrative Council would use the School Council's priorities in making a decision.

At the meeting, this father had tried to set the agenda so that we would give the School Council the profiles of principals being considered and then they would choose the new principal. Peter explained that we needed their priorities in a new principal i.e. did they prefer a curriculum specialist to a technology expert? Given that direction and given the principals available for transfer or new placement, we would try our best to meet their request to find a match. Michael's father appeared to me to be accustomed to being in charge. **I was impressed with his willingness to accept this alternate approach. We left the meeting with a much clearer understanding of the nature of the community and its expectations.** Their input was sent to the Council, the current principal and the in-coming principal. **Since then, provincial legislation in 2002 makes School Council involvement on interview teams mandatory.**

What were my feelings and reflections?

First, I was pleased that principal had not been averse to coming with a legitimate problem considering that she was 'In Transition'. I left the decision to her as to what she wanted me to do so that I did not undermine her confidence. When she asked me to call the parent, I agreed because I felt that I might be fortunate enough to find the right words to get him to look at some options to retaining his son in grade ~~eight~~^{seven}. I

also hoped to model for her ways of working with parents in the best interests of the child. I am an advocate for the child.

Second, my former encounters with this father came back to me and I tried to frame in my mind how I would approach him and what reaction I might expect from him. In any conflict situation, I try to remember that “sound advice is to be soft on people and hard on the problem” (Fisher & Brown, 1988, p. 140). I often feel some tension around whether the parent wants to win a contest, to compete, or to solve a problem and whether I will manage to find a “Win-win” solution (Covey, 1992). **The primary purpose in any issue of this sort is to find a solution that is best for the student and to preserve the relationships.**

In our telephone conversation, the father was very pleasant and I felt some initial relief in that. I have been influenced by the work of Stephen Covey and he uses the term, “Empathetic Listening”. **I had been working on my skills to listen empathetically to not only what the person is saying but also to what feeling is beneath the words. How can I listen better so that I can work with the parent to find solutions that are in the best interests of the child and not compromise my own values?** However, despite using all of my skills in conflict situations, he remained firm in his decision. **I felt, ‘So be it; how can I allow both he and the principal to move on gracefully?’**

Between the phone call from the principal and her arrival in my office, I talked with the superintendent responsible for curriculum and assessment about the issue around parents insisting that their child be retained. Consulting with others is common practice for me. As Blanchard & Bowles (2000) say, “No one of us is as smart as all of us” (p. 95). When I showed him the report card, he said that he, too, would promote the boy with support recommended. He noted that another superintendent had had a similar situation and he had decided to ask the parents to sign a form taking responsibility for the decision. He gave me the form for modification. I hoped not to

have to use it but saw the merit in having parents recognize that they took some (not all) responsibility for the decision. With rights, go responsibilities.

What did I learn from this experience with Michael and his father? I did my best for this child but I was not the parent. I shared my knowledge of the research and my experience with children and retention. While our dialogue did not change anyone's mind, it did air the issues so that each of us felt that we had been listened to and each cared about the child. **This is a significant point that I sometimes lose sight of – just listening, just attending to the other is a primary tool to solving problems.**

It seems unlikely to me that "outsider" research on retention could have encompassed the life below the surface of the pond. I think one of the reasons that educators use research once they've done research is that their own research gives them "hooks" on which to connect the academic research. Without the "hooks", it sounds like theory ungrounded in real experience in the classroom. I need to start with: This is what I know from my own world; now what experiences have others had? How do they compare? Relevance is as important to a professional educator like me as it is to a young child.

Now my relationship with a teacher. I have decided that a story about my role as teacher advocate is necessary for you to understand that that is also a part of my role that I see as essential as my duty to supervise and where appropriate to discipline. It may be that my many years working in teachers' federations, local, provincial and national, have made me more of a teacher advocate than some of my peers. I sincerely care about and admire teachers.

What is my role as teacher advocate?

I am frequently in the role of student advocate in my role as superintendent because after all the other routes have been exhausted, parents and sometimes students ask me to intervene for them. Sometimes I am in the role of disciplining teachers. Over the years, I have written letters and suspended some without pay for inappropriate

behaviours such as not attending Professional Development Days and repeated violations of board policies. On the other hand, I also advocate for a teacher in difficult situations. Usually some form of investigation is required. This ~~is~~ story is a case in point.

First, some context. Because the educational funding model funds school accommodation based on a dollar amount per square feet per student (as ridiculous as that sounds, it's true), how much money the board receives for school buildings is dependent on the number of students in the board.³² In my Simcoe family of schools, in particular, there was and will continue to be declining enrolment until 2010, and, therefore, unfunded spaces in schools. The only answer to that problem is closing schools or finding alternative uses for them. This situation was the precursor to the October/November 1999 accommodation study of schools in my family. It involved seven public meetings sharing the enrolment data and looking for solutions to the problem, a committee report to the board on the input received and ultimately a board motion forcing a choice between closing a secondary school or closing elementary schools in the area and creating a grade seven to ten school in the secondary school building.

Angered by the board decision, the community held several public meetings of its own to solicit community support to oppose the forced choice decision. At one of the meetings, a teacher took a list of students who came from out of area to that school and where they lived. It was reported to the director, Peter Moffatt, that this private information had been taken to the meeting. Legally information collected under the Freedom of Information and Protection of Privacy Act cannot be used for purposes other than that for which it was collected. The staff member appeared to be working in opposition to her employer and contrary to the law.

The director wrote to the principal of the school and asked that a report on the incident be made to me. I received the report and a phone call saying that no actual names were

³² See Chapter 1.

released. The teacher had provided numbers only as requested by the community members. The principal said that the teacher had no intention of releasing confidential information and regretted any indiscretion. I reported this to Peter. He persisted in knowing if the information was used for purposes other than that for which it was collected. I said that it appeared that it had been but the teacher assured the principal that it would not happen again.

In the meantime, I received a call from the union steward asking if there was any file kept on the teacher about this incident. I said there had been no discipline to date and thus no file in her personnel records. He asked about records in the form of e-mails. I said yes, of course, there were e-mails. I reported this to Peter. He responded that, in fact, he did have e-mails on the topic, that he had every right to investigate a complaint about a staff member and that I should send the issue to the superintendent of human resources. Another point to be made here is that because of the distances to schools from the office it is much more difficult to drop what you're doing and go and see people face to face which is always a better model. In the conflict situation above I went to see the principal because the Brant board was very compact in distances. I regret that the large distances in the new board effect a loss of personal contact.

I felt that the Peter thought I was being soft on the teacher especially when a list of names of students who required extra help had been released by the school staff earlier in the year. I knew that the teacher had been one of the signatories to the letter but it seemed to me to be a different situation. **Also I was just beginning to experience some positive relationships with the staff in my new family and wanted to give them the benefit of the doubt. What struck me at the time was that Peter had frequently in the past criticized my focusing on task first and people second (Moffatt, 1995-2001) and here I felt that I was being sensitive to people's feelings and past practices.** It did seem ironic. In any case the story does give a sense of how complex issues can be, how muddy the waters get in investigating complaints, how influential and significant the political context is and the importance of valuing the other in my professional relationships.

I think autobiographical narratives like the ones in this chapter can contribute to the knowledge base of the life of the educational leader that David Clark (1997) was proposing in his Division A Invited Address at the 1997 AERA Annual Meeting in Chicago: The Search for Authentic Educational Leadership: In the Universities and in the Schools. The challenge of getting on the inside of my life as a senior manager is that either I overburden the reader with detail or I leave out essential information to make it a readerly text (Mellett, 2000). I hope I have found the right balance for revealing authentic educational leadership in schools.

And now I want to share some of my experiences in my role as a system manager in building a culture of inquiry, reflection and scholarship and mobilizing systems to improve student learning.

Chapter Three

BUILDING A CULTURE OF INQUIRY, REFLECTION AND SCHOLARSHIP

Part A: Mobilizing Systems to Enhance Teachers' Research-Based Professionalism In Improving Student Learning

Chapter Three explains my influence in helping to build a culture of inquiry, reflection and scholarship within a District School Board. Because of the importance of the connections between the personal and the professional in my thesis I share my life with the people as well as the tasks in my system portfolios. The first part of Chapter Three is focused on my system portfolios of Community Relations, Career Education and Assessment. My analysis is focused on how I mobilize systems to support people through connections, networks and relationships and then I look at the transferability of that knowledge from one situation to another.

The second part of Chapter Three analyses how I have managed to provide sustaining support for inquiry, reflection and scholarship as a systems manager. It focuses in particular on my influence on the development of a culture of inquiry and reflection as I mobilize system supports and then create sustained supports through contributing to building communities and networks. The *systematized knowledge* that Catherine Snow (2001) is searching for already exists in my board and other boards in Ontario and across the world. I begin with my initiation into action research, the beginning years in Brant, the supports that I built up to provide sustained support for the teachers and principals in my district and as an additional benefit in other districts.

I want to frame this part of the thesis with how I envisage the work of managing systems in a broad perspective. Rather than seeing myself controlled by regulations and legislation which are indeed a fact of life, I see the opportunities for accomplishing a vision of a better world in which students can develop optimally given their capacities. Part of what I do is carry that fervent belief and hope in a very visible, relational and action-oriented way. People see me doing and being that vision. In earlier chapters I talked about policy having the capacity to liberate even though governments frequently interfere, and I've also talked about that fact, there are vast arenas in which there is unlimited room for creative and productive work in a *context of creativity* (Csikszentmihalyi, 2001, p.116-124). I have no delusions that managing systems is simple to do but there is a simplicity to it.

Great groups need leaders who encourage and enable. Jack Welch once said of his role at General Electric, "Look, I only have three things to do. I have to choose the right people, allocate the right number of dollars, and transmit ideas from one division to another with the speed of light." Those three tasks are familiar to almost everyone involved in creative collaboration (Bennis & Biederman, 1997, p. 26).

It is complex and demanding and requires a committed effort from all of the players to produce the synergy to improve the social order, in my *domains* (Csikszentmihalyi, 2001, p.116), focusing on students, school and office staff, families and communities to create a culture that supports student learning.

In Chapters One and Two, I shared two perspectives of my role, Executive Council and Family of Schools. In this section, I am connecting the functions in those aspects of my role with my system portfolios again with the unifying values of valuing the

other and building a culture of inquiry, reflection and scholarship. Just to review, in my family of schools I am the supervisor of the schools through the principal. With system portfolios, I have responsibilities for particular focus areas in the entire school district and as well I influence operations that are not technically in my particular portfolio through input to policy and procedures. My portfolios have changed over the period of my tenure as a superintendent and since there have been many and I share some in other parts of the thesis¹, I will deal with only a few.

In more stable environments superintendents might have a portfolio like Curriculum, Special Education or Human Resources for an entire career. Commonly, Peter Moffatt² gave me roles that required innovation, large-scale change and for which there was frequently no past practice in the board. I often referred to my portfolio as the ‘things that need doing but that don’t fit anywhere or that no one else wants to do’. I welcome and need that challenge and, in fact, seek it out. While support staff that worked with me had specific job descriptions, frequently they picked up other assignments that came my way. When staff work with me, working with the parents and community and in action research just comes with the role. If they have past experience in those areas, that’s a benefit and if they don’t, I take time to coach them and find great pleasure at seeing their growth. I have learned as much, and sometimes more, from them as they have from me.

When I speak of my system portfolios, then, I mean those roles in my job description that affect the entire school district, not just my family of schools. Because of their higher profile, they are the ones on which the system judges my performance. That

¹ See Chapters 1 & 4.

² See Chapter 1.

profile comes from the fact that staff and community across the entire district regard me as the resident expert in that arena and that those are the reports that I submit to the board of trustees for policy decisions and thus are the ones reported in the media. The concept of 'expert' is an interesting one. When Peter gave me the Career Education portfolio in 1995, I said that I knew very little about it. His response was that by virtue of my task commitment and attention to the area, I would be the 'expert' in six months. These portfolios¹ have changed as many times as the membership of Executive Council for obvious reasons. The staff assigned to assist me in these responsibilities have changed as well because of term appointments, advancements, changes in job assignments (mine and theirs) and retirements.

In this section, I take you into my processes of growth and learning in order to understand how my vision and directions are created and implemented. I explain as well the connections between my career path and the personal and professional parts of my life. It is important to see the connections like the faces of a hologram. The work I do as a volunteer in the community is connected to and improves my work as a superintendent and derives from the same values I hold about children, families and learning. First some of the history of my system portfolios, career connections and volunteer work.

COMMUNITY RELATIONS AND PARENTAL/COMMUNITY INVOLVEMENT

My portfolio of responsibilities has included community relations and parental/community involvement from my first assignment in 1995 and, in fact, evolved from a combination of my interest, a need Peter and I saw in the system and a shift in society for greater involvement and accountability. I'm not sure of the origin of my interest but I think my experience as a mother, my work in special education, my

¹ See pp. 445-450 of the Appendices.

leadership in the Community Teamwork committee for the Brant Board (DeLong & Moffatt, 1994) and my involvement in The United Way, a fund-raising organization that supported families through a variety of organizations, provided the basis for the value. I had, and continue to have, a vision of a community that values education and an education system that values community. When Peter and I first talked about my areas of responsibility, we called this portfolio "Education-Work-Community", a bit cumbersome as a title but at least clear as to intent. By 1999, we changed the title to Community Relations which, while shorter, is less specific. In any case the work was a matter of bringing together the groups that had an investment in education inside the conversation so that people affected by decision-making had input into the decisions (Sergiovanni, 1992).

Out of our work together on The Community Teamwork Committee, Peter and I created a framework in which we saw Parental/Community involvement occurring at a variety of levels (DeLong & Moffatt, 1996). We felt that we could encourage involvement if people had options that fit their interests, schedules and comfort. The levels included a spectrum of participation from working in school classrooms to going on field trips to providing advice on School Councils and governance as board trustees. We also recognized that we had a great deal of work with both community and staff in changing the system to a culture of involvement. Like Sergiovanni (1992), I see the assets that others can bring to the process of improvement, assets that have long been overlooked or ignored by educators. **We are also finding in 2001 that we are using a 'levels of involvement' framework as a means to clarify what 'involvement' means when staff and community members volunteer for committee work. Our hope is that defining the kind of involvement might prevent some of the confusion caused when people think that an advisory committee is a decision-making committee.**

Many studies provide evidence that engaging parents and community in schools improves student learning (Coulombe, 1995; Epstein, 1995) but, in particular,

involving parents in their child's school work encourages higher achievement (Ross, 1994). As Peter Moffatt said in his system newsletter, 'Keeping In Touch' (1995), "In fact, there is a lot of research to suggest that involvement in **"Home"work** will have the greatest positive impact on student learning." After three years of focus in the Brant Board, we had evidence of increased parental/community involvement in the six levels that we had designed in the Community Teamwork Committee (Delong & Moffatt, 1994, 1996; Moffatt, 1995-2001) but none that showed a direct co-relation to improved achievement.

During my years as Learning Resource Teacher, Department Head of Special Services and Coordinator in Special Education (1982-89) I learned to respect the role of the parent as essential to support the learning of the children with special needs. The time they spent at school was just not sufficient to bring about the changes necessary to guide them to improved learning. I needed the parents and community service agencies to work with us as partners in the process. I saw my role not only as teacher of skills for the students but also as a builder of bridges, a scrounger of resources and an opener of doors so that the students would have support, opportunity and challenge to reach their potential. It is unlikely that educators can provide for the needs of students independent of the rest of their world.

The United Way was a natural for my volunteer work, especially when the local organization was floundering because of its incapacity to change with changing times. I see volunteering in a community role as part of my commitment to improving the world for children and families. It saddens me to see reports on the decline in the numbers of volunteers in Canada, down 7.5 million in 1997 (Bains, 2001). I worked with the board of directors and the Executive Director to respond to the changing dynamic of the community and to build that capacity to plan for the future. The

organization has never looked back and has had successive successful fund-raising campaigns.

Because of my work in The United Way I was invited to become a member of the Brantford General Hospital Board. Some days I wondered at the wisdom of my choice of volunteer work when I would deal with the economic rationalist policies of the government in my day-to-day work and then go to the hospital board and deal with the same pressures. Also, the hospitals were being restructured in the community and one of the local hospitals was closed – a similar amalgamation experience to the school boards.⁴ I think it helped me be more effective as a board member to understand the politics of the decision-making, budget, public and policy pressures and see that the government was attacking sectors other than education but it did not provide any relief for me from them. It appears in 2001 that the provincial government has decided that it has brought the health care system to its knees and is now being kinder and more generous. We can only hope that the same will happen in education.

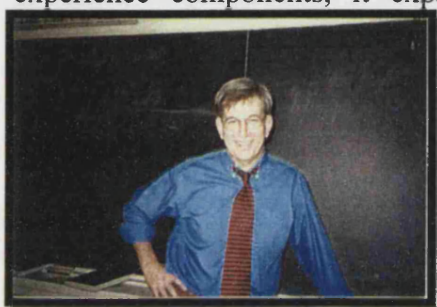
For the years of this study, 1995-2002 I held this responsibility of building connections and partnerships with the communities. My extroverted nature made me the obvious choice on an executive team that was made up primarily of introverts who did not enjoy the social role. Because I had lived and worked in the Brant area for all but two years of my life, making those connections between the school system and the community met some resistance but at least I knew the geography and the community groups. When I am starting out to build a community partnership, I start with a system need and then make connections with people with similar interests who I feel will be interested in pursuing a partnership. Frequently it is a back and forth motion of testing out potential, seeing a way forward or a blocked route and trying again in a problem-

⁴ See Chapter 1.

solving process: Who would like to help me with this project that will mutually benefit our groups? One area was career education.

CAREER EDUCATION

An area that Peter Moffatt and I identified as needing attention within this community-related portfolio was that of school-to-work connections. While there had been work done in cooperative education, a program which combines in-school and work experience components, it expanded considerably into more varieties of work



James Ellsworth, teacher, philosopher, scholar and friend; I have known James for 30 years.

placements through the work of program consultant, James Ellsworth. A Review of Career Education (DeLong & Ellsworth, 1997) gave us information on how to improve programs and where we needed to go next. James brought a close alignment between academic studies and work placement by broadening the types of work experience and strengthening their connections to particular courses.

When amalgamation occurred many of the programs and partnerships needed expanding to the other areas of the new district. In the six years of that portfolio, there has been remarkable progress in the spectrum of programs and the community partnerships that enhance services for students as evidenced in annual reports to the board. (DeLong & Ellsworth, 1997; DeLong & Morgan, 1999; DeLong & Ellsworth, 2000; Moffatt, Director's Annual Reports: 1995-2001). When James chose to return to the classroom, Elaine MacAskill picked up the responsibility at the consultant level. A year later, she left the board for a school administrator position in another board. While I have been able to hire the *right people* (Bennis & Biederman, 1997), it is an

annual process of replacing at least some of them. Then I combined assessment with career education in a coordinator position, a position of greater responsibility than consultant.

CAREER EDUCATION AND ASSESSMENT



This is a photo from (Wideman, Delong, Hallett, & Morgan 2000) of my friend and colleague for over 30 years, Diane Morgan, former Coordinator of Assessment and Accountability, now retired and working as a consultant on contract.

With amalgamation, Diane Morgan whom I had worked with as teacher, principal and coordinator, was appointed Curriculum Coordinator-Assessment and Career Education after a difficult exercise in politics. With amalgamation, every appointment became a contest as to which former board the person would come from. With the restructuring of support staff, Diane who had been coordinator in Brant was out of a job but by reorganizing some other staff I was able to retain her advisory/consultative role and to find meaningful work for her last year before retirement.

Diane and I have been colleagues and friends for over thirty-five years from the days that we were both secondary school teachers at Pauline Johnson Collegiate and Vocational School in the late 1960's. Her subject specialty was Geography and mine was English. We both taught students, not subjects. I married and left teaching to raise my children but we remained connected partly because my ex-husband was active in the district teacher federation, the Ontario Secondary Teachers' Federation (OSSTF) work and so was she and the meetings were frequently at our house. When I returned to part-time work, 1979-81, while my daughter was still in pre-school, I often

provided temporary replacement for her or someone in her department or school as an occasional teacher. I returned to full time work in 1981 and was again active in federation, as was she. In 1984-86, I was Ontario Secondary School Teachers' Federation District President, a position she had held two years earlier. From 1986-88, we were in system coordinator positions at the same time, she in curriculum and I in special education, with then curriculum superintendent, Peter Moffatt. Those were intellectually-stimulating years with Peter pushing us as a team of six to develop and implement programs across the Brant County Board of Education. There was a close bond in that group and we were devoted to Peter.

I left that role and went into school administration because of a values conflict with a new superintendent of special education and a desire to get into a line position which is recognized as a more likely route to the superintendency. "The latter (line positions) have historically provided the visibility, socialization, and other opportunities necessary for career advancement to the superintendency" (Brunner, 1999, p. 35). Curriculum positions were out of the line of advancement. **In the last 3-5 years that has changed to a degree, partly because people like me demonstrated that lock-step advancement through school-based administrative posts (I never held elementary teacher or vice-principal positions) was not essential. Women especially experience broken career paths in careers and now there is a high demand for school administrators.** As principal of an elementary school, I was able to talk with Diane, then Curriculum Coordinator, and get her advice on the needs of the teachers and students and she was regularly involved in my schools. My school improvement plans were always based on advice from her knowledge of curriculum and assessment.

As Coordinator of Assessment and Career Education, Diane was an expert in assessment and loved that part of the role. While she didn't love the Career Education as much, she made every effort to do the necessary work but the advancement in

assessment, evaluation and reporting in the new board was remarkable-holistic marking, leveling work and rubrics became common language. She taught me a great deal about curriculum and assessment. I did most of the community connections so she could focus on assessment. **I enjoyed this work because I could carry information and relationships across domains to make creative connections and influence the culture of the community** (Csikszentmihalyi, 2001, p.116). Diane and I struggled with our values through the early years of provincial testing and gradually managed to find ways of accepting the mandate and of using the results to help improve learning. (Delong & Morgan, 1998). I can remember our devastation when we received the second set of results and there was little improvement despite all our efforts. What had we done wrong? It was not a happy time. But being reflective practitioners by nature, we kept analyzing the data. We were a very productive team, which is not to say that there weren't disagreements and testy conversations. Again, as with Peter Moffatt, our shared values and commitment to student learning made it possible to find a way through, if not agreement on everything.

There is a close connection in my life between the personal and the professional. Our relationship was not purely professional. When I was experiencing more freedom, as my children grew older, we were involved in more social events such as dinners and theatre. Like me, her job was on the line when amalgamation hit. Our most difficult time was in the transition between Brant and Grand Erie and she failed in her attempt to gain the curriculum coordinator position. As I said, that was finally resolved. During the breakdown of my marriage she was a friend to lean on. When she went through an episode fighting cancer I took a similar role. A workaholic like Peter and I, she and I would combine work and social so that a dinner together was often planning a presentation that we were doing together or writing a board report.

I worried that in her retirement, we would lose contact but that has not been the case partly because I have been able to contract with her to support action research projects during 1999-2001. In 1999-2000, she provided support for An Action Research Approach to Improving Student Learning Using Provincial Test Results (Wideman, Delong, Morgan & Hallett, 2000) project and in 2000-2001, she supported action research projects focused on student-led conferences (Morgan, 2001; Delong & Moffatt, 2001¹) and helped with Passion in Professional Practice: Action Research In Grand Erie. (Delong, 2001b).

When Diane retired in June 1999, I felt a real loss but was fortunate to hire James Ellsworth (see above) another teacher that I had worked with at Pauline Johnson (PJ). I remember that he came to teach in 1968 at PJ, two years after I did and I called him “the rookie” and tried to be a mentor to him. I remember fondly his ‘hippie’ sandals and love for teaching. When he transferred to Paris District High School, he taught my children both of whom thought he was a wonderful teacher. In the Brant Board, he had worked with me as Career Education consultant and I knew the quality of his work. He had left that post because he missed the students in the classroom so much. I understood that completely. At the end of his first year in the coordinator role, he went through the same angst but he remained in the coordinator role with a concession that he could devote some of his time to the writing of a new History curriculum. **A combination of my standards of valuing the other and building a culture of inquiry, reflection and scholarship is evidenced here. His intellect demanded some deep work in his passion area and I massaged the role to accommodate that.** James is the only support staff member I can remember who kept being drawn back to his love for classroom teaching. For most, it is a demanding role but with much more flexibility and a larger stage and they resist returning to the school with its restrictions, as I experienced in 1990 going from Special Education Coordinator to principal.

¹ See EQAO Interim Report: pp. 460-474 of the Appendices.

As with Diane, James brought his particular strengths and interests: he found the Career Education part of the Coordinator of Assessment and Accountability more comfortable because of his former experience as consultant and while sustaining and enhancing the work of Diane in assessment, he put more attention on career education. After the first year, he grew in confidence in the role, and I left most of the work in Assessment and Career Education to him, meeting regularly Monday morning to keep the various tasks on track. **One of my learnings from working with Diane was that I needed regular meeting times to sustain the relationship, to value the other and to keep track of projects with staff.** We both are dialectical and dialogical and those meetings were essential to anticipating and solving problems and to reflecting on and refining reports to the board. He became the expert on the Education Quality and Accountability Office (EQAO) testing processes which by then included testing of grades 3, 6, 9, and 10, success in the latter being a secondary school diploma requirement. Unlike Peter, Diane and I, James has a better sense of balance. He took up the role of helping me find balance between work and home and I think he has to some degree. His monthly reports on his activities include both his own efforts at finding balance and a reminder to find my own (Ellsworth, 1999-2001).

As I watched him grow in the job, I was reminded of my own learning in understanding politics. At the February 23, 2001 board presentation of the Board EQAO Action Plan for submission to EQAO, he did a very competent job of presenting the plan for improvement succinctly and concisely in language that the trustees could follow. He had a 'professorial' manner that could interfere with communication but we had worked on it and he became increasingly conscious of it. I thought about how much his presentation had improved from the first one in November of 1999. Then one of the trustees asked him if he was going to set a specific target for improvement. In his booming, radio announcer voice, he said,

“No!” We had agreed that he would answer any questions pertaining to the content of the report and I would answer the political questions. This one slipped through. I remember doing the same thing in my first report to the new Grand Erie board in November 1998 when asked if I was going to release the school by school grade three results to the public. Because I was new to this portfolio and it had not been past practice in the former Brant Board, I said, “No.” Wrong answer. Later in discussion of the reports, in both cases, we did consider targets and did release the school by school results. I have learned, as has James, that an answer like, “I hadn’t considered that.” and “What would you recommend?” are appropriate responses to trustees. For the action researcher, the opportunities to learn and improve are a constant.

HOW DO I MOBILIZE SYSTEMS TO WORK FOR AND SUPPORT PEOPLE?

Uncovering what Jack Whitehead calls the wisdom I hold around knowing systems, my political ‘nous’, has emerged through a combination of the dialogic and the dialectic focused on my narrating, assessing and explaining my experiences. While I often appear to do things effortlessly, my prowess comes out of years of experiences, both successes and failures and as a result of *creative collaborative* (Bennis & Biederman, 1997) work with mentors like Peter Moffatt and colleagues like Ron Wideman, Associate Dean at Nipissing University⁶. My continuous push for advancement can partly be attributed to expectations from my childhood of high attainment and a need to feel that I have had a productive life in improving the world. I feel that I can have a greater impact on education in the broader sense as a system leader. Not everyone would agree with that. Because of that belief I have sought out and accepted system roles.

⁶ See Chapter 3B.

In the narratives above, I began an activity or project with a vision, not a blueprint, of a better way of doing things. I can visualize this in my head in a general way. Then my thoughts go to the people that can make it come to fruition, their connections to the concept and then different configurations on possible pathways to that improvement. I play with the pieces in my mind in different ways almost like turning a jewel in my hand. If I go this route how will it work? What problems will I need to overcome? Are there budget implications? Can money be found from internal budgets or are there resources in the community? This reflection may be quick or it may play out over considerable time. What does happen very shortly is that I try out my idea on people I trust like Peter Moffatt, Cheryl Black or James Ellsworth. They help me see the obstacles which, being the indomitable optimist I am, I am inclined to understate or overlook. Out of that playing with pathways in my mind and in dialogue comes a best alternative and that is where I start.

HOW DID I LEARN ABOUT SYSTEMS?

I can't be sure but it seems to me that working both in school board organizations, federations and in other systems was a factor in my knowledge of systems. I had been active in local, provincial and national teacher federation activities, holding elected office for many years. I have also held a systems position in the Brant board as Coordinator of Special Education Services and as well in volunteer positions as board member and President of the United Way and board member and Chair of the Brantford General Hospital Board— these too are systems. There is no such thing as a 'system way of doing things' but systems and organizations share some common practices with which I became familiar. They provided a bigger stage and opportunities to make connections across *domains* (Csikszentmihalyi, 2001, p.116).

Why did I mention that I was president of the United Way and Chair of the hospital board? Status is not a concept I enjoy but I have to accept that I do want to be

recognized for my contributions. Gaining promotions that I aspire to and feel qualified to handle buoy my spirits and makes me feel valued. I think I enjoy success as I define it and that definition does change. I feel that I get as much, even more, enjoyment out of seeing others succeed as I do my own. My ambition, and that is certainly what it is, has come as a result of needing and searching for challenging opportunities to test my capacities and to continue to develop and improve. Even as I write this I am keeping my eyes open to a director's position having kept that consideration on the back burner pending completion of this thesis. Why do I want this? I would welcome the challenge of the most senior position in the school system and being the leader of the administrative team in a very challenging and exciting time in education.

I have talked about not wanting this to be a study focused on gender. However, given that I do want to be an effective superintendent, the chair of the hospital board and perhaps director, I am aware of my active concern that women be seen in senior positions in organizations and on community boards. I am aware as well of the importance of role models for young women, my daughter notwithstanding, so that they are not limited by "mental models" (Senge, 1990) or stereotypes of what is possible. Maria Birkett, Marion Kline, Cheryl Black, and Ruth Mills and many others have talked about the importance of me as a role model for them. I want to have lived a life as an effective superintendent and senior woman manager.

When Susan Noffke (1997) talks about issues of power and privilege, I think she is seeing those issues as negative ones. In my knowledge of systems I have a power to mobilize resources that allow people to do the things they want to do. When people like Cheryl Black or Greg Buckles or Ruth Mills⁷ come to me and say, "I want to try this strategy that they hope will help students learn better", I will leave no stone

⁷ See later in this chapter.

unturned both within the school system and in the community to get them the supports they need. I think that is much like Brunner's "power with/to" philosophy (Brunner, 1999). The only proviso is that I expect to hear in advance how they will find the answers to the question: 'How will this strategy improve student learning?' and afterward to receive a report on the answers they found.⁸ So while I devote myself to getting people the supports they require, I do require accountability for those resources as I feel I must be accountable to the board and the public as well as to my own values as standards of practice and judgment. **I think that is a power for good, a privilege that I can and do use to improve the social order (McNiff, 1992).**

Ruth Mills, principal and leadership program chair, sent me an e-mail (when I was at Bath University in March) about the project that I encouraged that shows that systems' influence:

Dear Jackie

I am writing to tell you how excited I am about our current Action Research projects. Last night we watched the video from the kit. The kit that Ron Wideman and I developed has been a well-used support (Delong & Wideman, 1998a). Everyone loved it and seemed energized by it. The professional talk following the video was wonderful. Here were the voices of the teachers and administrators talking about their learning through action research. Everyone has framed a question and the entire staff are embarking on their projects with zeal. I have noticed a more positive twist to conversations in the staff room: "let's tell Bonnie (Kutsch) about our action research. Maybe she can give us some feedback" " I am so excited about this I have wanted to do something along these lines for a long time with my students."

⁸ See Chapter 2.

Because I regularly ask for feedback on how I am doing, people like Ruth let me know without prompting. *We will talk when you return.*

Love ya,

Ruthie

PS Thanks Greg for the money. This is the research fund that I have struggled to get and retain for four years - 1998-2001 and Greg, her family of schools' superintendent, controls.

*Ruth Mills
Principal
Lansdowne-Costain School*

March 21.01

HOW HAS MY POSTMODERNIST ATTITUDE AFFECTED MY SYSTEMS KNOWING?

Another aspect of my ambition has to do with my penchant for innovation, change and my postmodernist attitude – I resist structures and rules. Tracking my career and my activities in it, there is a running theme of doing things differently, of challenging the status quo, of resisting traditional or sequential models. I think there must be a correlation between living that way and encouraging that in others. It is not that I disregard tradition; it is just that I have to question "Why?" and "Is it the best way?" It looks and feels like improvisation, a "recombining partly familiar materials in new ways especially sensitive to context, interaction, and response" (Bateson, 1990) and creativity, "a person should enjoy pushing the envelope of a particular domain" and "promising signs are interest, curiosity, and an almost childlike naivete that questions everything, that is dissatisfied with the answer: 'But that is how things have always been done'" (Csikszentmihalyi, 2001, p.118).

In the years 1983 to 1999, a span of sixteen years, I took a number of innovative or at least 'out of the ordinary' career actions. Because of my break in service to raise my children, from 1973 to 1981 and because of an overabundance of teachers, I held a number of temporary teaching positions as I tried to get myself back onto permanent staff. In 1983, I was surplus to the school system and was offered a job that I was not qualified for and didn't really understand. And yet I accepted the challenge of a position new to secondary schools in the board: Learning Resource Teacher. It was a choice because I was also offered Typing and Geography, positions that I had some experience in and understood. I chose the risk, went to summer school to get the accreditation and embarked on open seas. I loved the job. Once in Special Education I became an advocate and innovator. Because of my political action on the federation negotiating team, I was instrumental in creating the new position of Special Services Department Head. This was important because if you are not part of the decision-making structure in secondary schools, you are not involved in the decisions. In my experience in secondary schools, the decision-making body was Heads' Council. If Special Education was going to have an influence on improving student learning, it had to be part of that structure. I applied for and was appointed department head of Special Services at Paris District High School. When I was elected District President of OSSTF in 1984, I didn't want to give up my headship and the influence of this new headship position so I negotiated a combination job of District President and Department Head, halftime each.

Needing a new challenge in 1986, I applied for and was appointed to Coordinator of Special Education Services for the board, a position that had not been held by secondary staff and not valued by secondary teachers. As the superintendent introduced me to my new department members, "Jackie is a mover and shaker." In 1989 I was appointed to the elementary panel as principal. I had never taught in elementary schools and I had not been a vice-principal, a position I had stubbornly

refused to apply for. This had not been allowed before in board. I believe that my break in service from January 1973 until 1981 (with part-time work from 1979 to 1981) provided me with the experience with change that gave me my flexibility and positive attitude to change and innovation.

HOW DO MY CONNECTIONS SUPPORT MOBILIZING SYSTEMS?

If one eschews hierarchies, one is much more dependent on relationship and trust. I recognize as does Stewart (2001, p.70) that trust has limits but it needs supports such as the other's competence, and community and networks. The word coined by Wenger and Lave in 1987 of "communities of practice" resonates with me (Stewart, 2001, p. 71). Connecting activities, understanding organizational systems and making them work to improve learning is my *modus operandi*. My involvement in the Ontario Educational Research Council (OERC) was a partnership that was of mutual benefit. For three years I had been part of the planning for the Act Reflect Revise Conference (ARR), 1997, 1998, 2000. In the planning for the 1999 conference, I was not involved and I was extremely upset when plans for it fell through. I committed to myself that I wouldn't let that happen again. For three years, I had presented at and/or been a board member of OERC.

In February, 2000, the ARR conference was held in Brantford (one of my purposes is to make programs and services easily accessible to Grand Erie staff). Lindy Zaretsky, special education resource teacher in York Region District School Board and some of her action research group presented at the conference. In conversations at the conference and at OERC board we recognized the sense in combining forces. She was responsible for the OERC conference in December, 2000 and wanted my help: York Region and Grand Erie could be the sponsoring boards. We both realized that holding two action research conferences a year was overkill and too much work so the ARR

team and the OERC team became one. What I did lose in that change was the move of the conference to Toronto where it had always been held. But that was the case only for one year since the 2001 conference was held in Brantford. While OERC supports all kinds of research, action research became the dominant theme and Jack Whitehead the keynote speaker in the December, 2000 and 2001 conference. I think it is worthy of note that while I am 'professionally selfish' in that I want the conference to be accessible to Grand Erie staff, I am most willing to share the opportunities because I think it expands the supports for classroom research and potentially contributes to sustainability.

How did this come about? When I joined the OERC board in 1999, I had no intention of becoming president; in fact, I had the opposite intention. I just didn't need the work. However, it was a combination in my mind of working with a person with that life-affirming energy (Bataille, 1962; Whitehead, 2000), Lindy Zaretsky, and providing 'comfortable stages' (Moffatt, 1998) for the teacher researchers to share their research (and Lindy's pressure) that I quickly moved onto the Executive. I could see Lindy's potential to influence systems if I coached her in the politics and processes. If OERC became a stronger organization, the continued support would be there for the teachers' sharing of their knowledge. Our e-mails over 2000-2001 are evidence of her questions, my responses and her willingness and excitement about learning.

I am always a teacher. I love to teach and learn. As I coach Lindy and Cheryl, I am aware of sharing my 'nous' so that they can be effective in working in organizations. I want to say this in humility because I realize that while I know some things, working with people like Lindy and Cheryl and the masters' students, I learn new ways of seeing the world. Both the 2000 and 2001 OERC Conferences were very successful, as evidenced in the evaluations; I have that purpose of accessibility for Grand Erie staff back on course and I am also planning for succession. Cheryl co-chaired the 2001

conference with me with a team of action researchers working with her on the program and she joined the OERC board in 2002 in my presidential year.

Another connection in this narrative is that of the Brock-GEDSB Masters Program. In 2000, Susan Drake was the President of OERC and one of the designers and instructors of the master's course. Part of the original design of the program was that the students would present at the OERC conference and submit a paper to The Ontario Action Researcher (OAR) (<http://unipissing/oar.on.ca>). Because both Michael Manley-Casimir and I had access to funds, all of the students were able to present at the conference.⁹ Because of my connections, the action research facilitators included: Tom Russell, Jack Whitehead, Jack MacFadden and Ron Wideman. Ron and I held an OAR board meeting at the conference and I managed a little time with Jack Whitehead to work on my thesis as well. The connections are present in the "communities of practice" (Stewart, 2001).

HOW TRANSFERABLE IS SYSTEMS KNOWING?

One of my learnings in this study is that despite the trauma of the restructuring, and its concomitant stressors, and without my moving to the Norfolk area of the board, I would not have grown or learned as much.¹⁰ I changed school systems in essence with a new culture, new staff, new ways of doing things for me to understand, appreciate, adapt to and at times, change. In the Brant board I had come to the role of superintendent with credibility based on a good reputation in a variety of jobs and positive relationships with many people (needless to say, not all). In Norfolk I came not only with few personal relationships but also with the negative of coming from the 'take-over' board. In starting over I knew that it would be difficult but I had no idea how difficult. Because I had to start at square one with building relationships, I was

⁹ See Chapter 3B.

¹⁰ See Chapter 1 and 2B.

forced to examine my values in foreign territory, to examine how I presented and how people related to me.

I find that systems knowledge is only partially transferable and very much contextual. I was very familiar with the Brant system but that did not mean that I was familiar with Norfolk. One of the major differences was that I did not start with well-developed historical relationships that would facilitate my entry to various people and places. Each meeting demanded my full attention to the dynamic, to the assumptions, to the relationships and to the preconceptions about who I was and what I symbolized for the group. That tension was very tiring. I rationalized that some of the negative perceptions were based on rumour and that if I could get in contact with people, they would see that I wasn't an ogre. I tried very hard to see the new system from their shoes and be patient and understanding of the time needed to bring about the change and the new relationships. I visited every school in my family in short order and negotiated a more democratic format for the family of schools meetings.

After four months, I asked the family of schools principals and vice-principals to evaluate my performance, much as I had in the former family of schools.¹¹ It was not an exercise in "group approval":

Sometimes we have to forego group approval and even accept rejection, if it should happen, in order to follow what the ancients called "scientia cordis," the science of the heart, which gives the inner strength to put truth, flowing from experience, over the need for approval. The science of the heart permits us to be vulnerable with others, not to fear them but to listen to them, to see their beauty and

¹¹ See Chapter 2.

value, to understand them in all their fears, needs and hopes, even to challenge them if need be (Vanier, 1998, p. 88).

I did not expect wonderful reviews but the extent of the criticism¹² I was not prepared for. It was in the second year that the relationships began to build and I felt less of the tension when I entered rooms with groups of staff. Some people began to see me as one of them and invited me into the family. When I hired principals and staff to system support positions, I stressed their role in the new system, not the old. Gradually, there was less talk of 'Brantfordizing' and more of creating a new system of Grand Erie. It seems evident to me that I was enabled to learn about myself and my kind of leadership because I had been stripped of the clothing of past history and had been forced to reinvent myself as leader in my new family. Moreover, I have been able to carry on my purpose of improving the school system. While respecting the past history of the region, I have been educating social formations (DeLong & Whitehead, 2001) which has frequently been in conflict with the *habitus*.¹³

The habitus, a product of history, produces individual and collective practices – more history – in accordance with the schemes generated by history. It ensures the active presence of past experiences, which, deposited in each organism in the form of schemes of perception, thought and action, tend to guarantee the 'correctness' of practices and their constancy over time, more reliably than all formal rules and explicit norms (Bourdieu, 1990, p.54).

Many of my colleagues retire with a feeling of disappointment at what they have been able to influence in their careers. I think that there is evidence within my embodied

¹² See Chapter 2 and 4.

¹³ See Chapter 4.

knowledge as I live my life as fully as I can according to my values and within the systems that I have influenced to account for myself. I do not want to look back on my life or my research with either Clark's (1997) pessimism or with the feelings of 'miserable failure' and 'painful awareness' so vividly described by Grant and Graue (1999) at the end of their three years as editors of the Review of Educational Research. They focus their awareness of their failure on the lack of practitioners' voices in the Review:

We tried to take some small steps to promote a more inclusive approach in research. In some ways it seems quite self important and arrogant now to think that we tried to make changes in a journal with such a long and esteemed history. But in other ways, we were trying merely to bring RER back to its roots of including diverse voice from the educational community. And that is where we failed most miserably. In looking back at the early volumes of the journal, we became painfully aware that we had been just as insular and just as provincial as our predecessors. We set up a conversation so that we, as academics, could talk to ourselves. We left out those off campus, who were actually doing much of the work of education. The editors of RER has spoken to them: "The Editorial Board presents this first issue in the confident expectations that it will be of great service to teachers, administrators, and general students of education." We had not. We got so caught up in the production of scholarship that we missed an opportunity to bring it to a broader audience (p. 395).

I want to focus on their failing 'most miserably, and their 'painful awareness' and move into a process of review and learning about educational research and theory which I think could help to avoid similar mistakes and pain for future editors of RER. In the next part of the chapter I describe and explain how I have actively sought to use

my system's knowledge to improve student learning by supporting teacher and administrator's researching their practice and getting their voices into the public domain.

The process of researching my practice has provided a systematic means to better understand myself, my values and my transformation to a calmer, more balanced and more assured leader and to become more effective at mobilizing systems to support people. "This work we are about it as important a work as there is to be done. We must do it with courage, and with vision, but we must also do it with good theory and deep experience and practice – and some grace" (Dolan, 1994, p.167).

PART B: SUSTAINING SUPPORT FOR INQUIRY

This second part of Chapter Three analyses how I have managed to provide sustaining support for inquiry, reflection and scholarship as a systems manager. It focuses in particular on my influence on the development of a culture of inquiry, reflection and scholarship as I mobilize system supports and then create sustained supports through contributing to building communities and networks. The *systematized knowledge* that Catherine Snow (2001) is searching for already exists in my board, and other boards in Ontario. I begin with my initiation into action research, the beginning years in Brant, the supports that I built up to provide sustained support for the teachers and principals in my district and in other districts.

In this part of the thesis I am demonstrating my values as standards of practice of developing a culture of inquiry by providing system supports. As always, the valuing of the other runs through the descriptions and explanations since it is through them and with them in mind that I do my work as superintendent. I will start with my introduction to action research in 1995 and then move immediately to 2000 to the citations in my award for Leadership in Action Research. At the 2001 Ontario Educational Research Conference, the Director, Peter Moffatt¹⁴ in his keynote address said:

One person deserves a lot of the credit for institutionalizing action research as an important component of the culture within our Board. This person has brought the force, the example, the support and the perseverance. She has developed the cadre of researchers who support each other. She has brought in the outside resources

necessary to keep the movement fresh. She has been able to ignore the pessimists (Moffatt, 2001).

He presented me with the Board “goose keepsake” which recognizes extraordinary work toward our system goals of support and alignment, improved student learning, leadership development, communications and relationships and accountability. While I recognize that this is but one indicator, I will provide evidence over time of my claim to have contributed to building and supporting a culture of inquiry, reflection and scholarship. I will then provide a description and explanation of the growth of action research to arrive at a “critical mass” (Moffatt, 2001).

As a result of disciplined reflection on improving my practice my activities move from one innovative activity to another making connections through relationships as I move ever ahead with a vision of a system dedicated to improving students’ learning in a culture of inquiry, reflection and scholarship. I describe my learning and setbacks as I carry on the teacher research activities even in the tumultuous years of creating the Grand Erie District School Board. As well as describing how I expand the supports that I have built up to provide sustained support for the teachers and principals in the former board into the new district, I also share my learning of the means to sustain activities and processes into other districts. The supports include networks, project teams, organizations, conferences, publications, accreditation and other human and material resources. I begin with small groups, invest personally in individuals and then support them to be the leaders in the communities or networks. In the research on change, one of the implications recommended for school districts is “think big, act small in multiple pilot projects on many interconnected themes” (Williams, 1992, p. 52).

¹⁴ See Chapter 1.

Why did action research resonate with me?

In 1995, I was moving in a new direction and inadvertently and without any real understanding of the potential of action research I was leading my school system in that direction too. The idea that teacher research can improve teacher professionalism is not new but it was new to me. Buckingham saw it as the 'scientific spirit of inquiry':

It is my firm belief that the emancipation and professionalizing of the teacher's calling rests far more on the originality, insight, and expertness which the teacher evinces than upon any considerations having to do with salary, tenure, or legal status. Society cannot be compelled to respect anybody or anything. The surest way to win respect is to be respectable...[Nothing] would so effectively obtain for the teaching body the possession of professional expertness...as the open-eyed, open-minded, scientific spirit of inquiry (Buckingham, 1926, p. iv in Coutler, 1999, p. 4).

Seventy years later, Susan Lytle and Marilyn Cochran-Smith (1994) take it one step further to the redefining of knowledge:

Research by teachers represents a distinctive way of knowing about teaching and learning...[Teacher research] will fundamentally redefine the notion of knowledge for teaching, altering the locus of the knowledge base and realigning the practitioner's stance in relationship to knowledge generation in the field (p. 35-36) (Coulter, 1999).

Lytle and Cochrane-Smith (1999b) trace the trends in the teacher research movement (1999a) and also talk about “inquiry as stance” and “inquiry as agency: the culture of community” and in terms of the potential of teacher research:

From an inquiry stand, teacher leadership and group membership look very different from what they look like when teachers are “trained” in workshops or staff development projects. Taking an inquiry stance on leadership means that teachers challenge the purposes and underlying assumptions of educational change efforts rather than simply helping to specify or carry out the most effective methods for predetermined ends (1999b, p. 294-5).

Building on the work of Donald Schön (1983) and reinforcing it with an emphasis on *teaching as a valued-laden practice* (p.9), Tony and Kaye Ghaye (1998) created an *evidence-based* (p. 9) *reflection-on-practice* model which is *cyclical, flexible, focused and holistic*:

*It is about knowing if reflection has led to any valued outcomes. Two of these are improvements in teaching and learning. Reflection-on-practice is a natural process of making sense of professional action: it is about using and learning from experience. Making sense of teaching is about seeing the process of reflection as a **meaning-making process**. Not only is this necessary for good teaching, it is also a fundamental human necessity (p.6-7).*

And in 2000, Richard Pring reviewed the work of Stenhouse (1975), Elliott (1991) and Foster (1999) in the field of ‘teacher as researcher’ and concluded:

The notion of teacher as researcher is important. It is crucial to the growth of professional knowledge. It is a refinement of the intelligent engagement in an 'educational practice'. It is a refreshing counterbalance to those who, in treating 'educational practice' as an object of science, necessarily fail to understand it. It is reassertion of the crucial place of professional judgment in an understanding of a professional activity (2000, p. 138).

It seemed to me in 1995, given my educational experience and my experience in professional development activities in the board and in teachers' federations that the connection between teacher research-based professionalism, improving student learning and professional development made sense and had great potential for a better educational system.

How did we get started in action research in Brant County?



Linda Grant, Executive Assistant, OPSTF, then Manager of PD Services, OCT and now educational consultant. I have known Linda, a member of my Validation Group, for ten years.

In the winter of 1994-5, Linda Grant, Executive Assistant for the Ontario Public School Teachers' Federation (OPSTF) and I represented OPSTF on The Common Curriculum: Policies and Outcomes, Grades 1-9 (1995) Implementation Team. The criteria the team established for organizations to access the \$1.9 Million Innovation Fund set up to implement the curriculum included innovation, partnerships, improving student learning outcomes, willingness to share results, in-service training, and the use of technologies. Linda

had visited with Jack Whitehead at the University of Bath in 1993 and came back with

the idea of making a proposal to use action research as a process to implement the curriculum. She talked to me about this idea of action research as having the potential to be a superior means of professional development as she had seen it at Wootten Bassett School near Bath University. This is an example of how ideas can travel from continent to continent: from this germ of an idea came a whole movement in Ontario. Linda drafted the proposal which would include four Ontario boards of education, Ontario Public School Teachers' Federation (OPSTF), Television Ontario (TVO), Ontario Institute for Studies in Education (OISE) and Queen's University. The proposal was awarded \$200,000 in June of 1995. From this point emerged the birth and growth of action research in my life and in my board.



Lori Barkans, Anna Morgan, Bev MacDonald, elementary classroom teachers, risk-takers extraordinaire. I have known them for six years. They were part of the original Group of Seven.

During the winter of 1995-96, I recruited and arranged training for teams of teachers to conduct action research in order to implement the new curriculum. In February 1996 in

Toronto, we held a forum, Act Reflect Revise, for the teams from the four boards to meet in facilitated sessions to share their processes and research. The teachers were willing to take a risk, as

was I, having faith in the potential of action research to improve student learning, to honour teacher professionalism and to help improve our practice. Lori Barkans, a member of the pilot study, the Group of Seven, wrote,

It has become a source of great amusement to each of us that we volunteered so readily for such a mammoth undertaking without even fully understanding the meaning of the words 'Action Research'. We

did not feel any pressure when being given one hour to decide if we were interested in this unique project. All we knew was that it would be an opportunity to explore new options and, hopefully, improve the quality of the education that we were able to offer to our students (Barkans in Barkans, MacDonald, & Morgan, 1996. p. 23).

In her writing it is easy to recognize the desire of the group to improve their practice for the benefit of students as well as my frequent flaw of moving processes ahead too fast. The comments the teachers made about the impact of the action research processes on their lives made the investment well worth the time and energy. "Action Research has allowed me to grow as a professional...Throughout this whole process, I have felt in complete control of all aspects, along with my two colleagues" (MacDonald, 1996, p.24) and "...there is satisfaction in knowing that in some small way you have tried to make a change, and at the same time, you have been able to grow as a professional." (Morgan, 1996, p.25).



Fran MacLean, vice-principal, Ed Wilson and Jeff Churchward, classroom teachers, presenting their research at the OERC Conference, December 5, 2000. I have known them for six years. They were part of the Group of Seven.

The story of the beginning of action research in the four boards is described in the issues of the Act Reflect Revise Newsletter (Grant, 1995-96) and in Act Reflect Revise Revitalize (Halsall & Hossack, 1996). The stories specific to the Brant County Board of Education are

found in several articles: "OPSTF Sponsored Common Curriculum Innovation Fund Action Research Project: Action Research and Teacher Networking" (Grant, 1996); "A Journey Through Action Research" (Barkans,

MacDonald, & Morgan, 1996) and "Banbury Heights Action Research: Home/School

Partnerships” (Wilson & Churchward, 1996); “The Role of the Superintendent in Facilitating and Supporting the Action Research Process” (DeLong, 1996); “Action Research: School Improvement that Honours Teacher Professionalism” (DeLong & Wideman, 1996).

We learned a great deal during the 1995-96 school year about teaching and supporting action research processes. We had no manuals for what we were doing and were unaware of stories of people who were experienced in teaching practising teachers and administrators from whom to learn. Jean McNiff’s work was very helpful, particularly her booklet Action Research For Professional Development (McNiff, 1995). Tom Russell came from Queens’ University to share his experiences with teaching teachers to conduct action research and Lynne Hannay wrote a booklet for OPSTF Learning in Action Thinkbook (Hannay, 1995) that year and as well provided training sessions for the teachers in the boards “to help them formulate research questions and begin to establish appropriate data gathering techniques” (Hannay, 1996, p.72). During the January workshop on Data Collection and Analysis, I remember the surprise and dismay of the Banbury teachers, Jeff Churchward and Ed Wilson, when they realized that the data (and they had boxes of it) they were collecting were not answering the question they had formulated. They very good-naturedly accepted that and went back to the drawing board.

It is important to remember that as these teachers were learning action research, they were learning a new curriculum and the role of the technology at the same time. My friend and colleague, Ron Wideman had moved from the Ministry of Education to TVOntario by this time and was part of a telephone conference to allow the teams to discuss curriculum issues. The photo of that conference call is interesting in that the participants are looking at the telephone! Now that we have videoconferencing working, it seems rudimentary communication.

In addition to publication of the projects in Act Reflect Revise Revitalize (Halsall & Hossack, 1996), both the Branlyn and the Banbury teams received much public attention for their work in presentations to the board and provincial curriculum associations, local and provincial conference workshops especially during the 1996-97 school year. The Banbury team was featured in a Globe and Mail feature on homework and on national radio. As a result of her work, Lori Barkans was appointed to the Ontario College of Teachers' committee on creating Standards of Practice for the province.

From outside the board, Lynne Hannay, Head and Associate Professor at the Ontario Institute for Studies in Education of the University of Toronto, Midwestern Centre (OISE/UT) with Research Officer Kathleen Schmalz completed a research project on the pilot projects in the four boards. Lynne conducted two workshops with the Brant teams and was involved in three of the forums. Kathleen interviewed Brant staff individually and in groups and made a report: "Report for the Brant County Board of Education: Observations arising from the 1996/97 study entitled: Action Research: Facilitating Teachers' Professional Learning" (Hannay, 1998). It was a strange experience to hear Lynne present her research, Action Research: Facilitating Teachers' Professional Learning (Hannay, 1998) at a session in the 1998 AERA in San Diego, and never once mention that one of the 'insiders' in the study was in the audience. **It was the first time I had a sense of what it feels like to be the object of research, the one researched about, the one without a voice. And I didn't like the feeling. Some feelings you just have to experience to deeply understand. As I write this, that sense of being violated floods back through my veins and it makes me angry. I make this point not to blame Lynne but to share what I felt: academic research from the outside can take away a person's voice and leave them feeling used and thrown away.** It is important to say that the report was highly complimentary and,

although it doesn't name me specifically, I was "the superintendent" (Hannay, 1998; Schmalz, 1998) referred to in the references to Brant County:

The Superintendent was cited as an important catalyst to the project's success. S/he provided knowledge of action research, support, a trust relationship and placed no pressure on participants. S/he initiated project involvement, gave strategic support, did the writing, provided extra professional development, gave personal support and was said to facilitate a "feeling of accomplishment" in teacher-participants (Schmalz, 1998).¹⁵

The Group of Seven – Lori Barkans, Anna Morgan, Bev MacDonald, teachers, and Jesse MacDonald, principal, and Ed Wilson, Jeff Churchward, teachers, and Fran MacLean, vice-principal - became the workshop leaders for other staff to learn action research. Jean McNiff came in 1997 to teach and support them and Jack Whitehead came to teach, encourage and support the networks of action researchers on an annual basis. As the Group of Seven learned the process of action research, I learned as well. It was collaborative learning at its best (DeLong, 1996b). After February, 1996 when I began my Ph.D. journey, I became a much better support for them as I researched my own practice.

YORK REGION LEADERSHIP IN ACTION RESEARCH AWARD (OERC)

From those early beginnings I want to take you to the Ontario Educational Research Conference (OERC) on December, 2000 where I was awarded the York Region/OERC Leadership in Action Research Award that I received. Lindy Zaretsky, President-Elect of the OERC said in her presentation of the award:

¹⁵ See Chapter 5.

You are cited for:

- *Facilitating the building of research networks to support a culture of inquiry and continuous improvement in classroom and school based research practices;*



Lindy Zaretsky, York Region Vice-Principal, President of OERC, presenting me with the first 'Leadership in Action Research Award', December 8, 2000. I have known Lindy and her tireless efforts for action research for four years.

- *Modelling reflective inquiry;*
- *Providing direct leadership and support to educators to enhance research-based professionalism in schools and classrooms;*
- *Providing opportunities for individuals to develop their own leadership capacity for innovative practice;*
- *Promoting the growth of a professional generated through action research.*

I recognize that the award is a single event but the evidential base for the award is extensive and I will provide it in the following descriptions and explanation of the supports that I have created and connected for inquiry, reflection and scholarship in my school system.

The Growth of the Action Research Supports, 1997-2001

A Brief Overview

After the first projects and during the early years, 1997-1999, I invested personally in professional development sessions to teach teachers and administrators to conduct action research by leading many workshops in Ontario on action research, most in Brant and Grand Erie but others in the Peel and Toronto Boards, in Huron County with Jean McNiff and in Ottawa with Ron Wideman. Every year I brought in Jack Whitehead to talk to groups both locally and provincially. It was a signal to us of the progress we had made that during 1998-99, Jack and I felt that he had done enough 'awareness sessions' in Grand Erie and that from then on we would only conduct sessions with people who were actually conducting action research and needing support. **In 2002 that is still the case: the awareness sessions are conducted by staff in the projects and area networks. Jack and I support those already engaged in data collection, analysis and writing.**

I started the monthly meetings of Brant Action Research Network (BARN) and organized the Act Reflect Revise conferences where staff could learn and get support. For the first four years, I held the weight on my shoulders. During the 1997-98 school year, I met once a month with a group of ten to twelve action researchers, providing support and teaching them the process, as they needed it. Cheryl Black conducted a project in her classroom as her performance review process and grew steadily in her knowledge and skill. Over the next year, the supports grew steadily in the Brant board with Diane Morgan and Cheryl Black¹⁶ taking more of the weight and then gradually extending the influence into the Grand Erie Board. With the new board, I was able to

¹⁶ See Chapter 2.

pass the leadership of the support networks onto Cheryl and Heather Knill-Griesser, Dave and Lynn Abbey and Peter and Paula Rasokas.

In 2001-2002, from a group of seven, the numbers have risen to well over 100 staff currently conducting action research projects in Grand Erie and a publication of thirty-five Grand Erie completed projects (DeLong, 2001b). Action research is integral to leadership programs; the Ontario Action Researcher is in its fourth volume and principals are researching their practice for their performance appraisal process. An Action Research Approach to Improving Student Learning Using Provincial Test Results (Wideman et al., 2000) and Passion in Professional Practice: Action Research in Grand Erie (DeLong, 2001b) have been published. Two groups of Japanese professors have visited to see action research in a school system, the Ontario Educational Research Council (OERC) conference focused on action research in 2000 and 2001 and fifteen masters student in a local cohort, who graduated with their action research degrees, are the new cadre of leaders.

This has been a “passionate enquiry” (Dadds, 1995). It is truly delightful to feel that the personal drive, commitment and passion that I poured into the first three years of action research in the Brant board and despite the slowdown caused by trauma of restructuring of education, I can now play the supporting role. I encourage, provide opportunities and resources in a supporting role so that now I can focus on and enjoy watching the growth and development of the teacher researchers. While the work is never done, it is interesting that new people are discovering its impact. At the Teacher Training Agency conference “Using Research and Evidence To Improve Teaching and Learning” on March 7, 2001, Jean Rudduck pointed out to the group that while many people have just discovered teacher research, Jack Whitehead has been encouraging and supporting it for over 20 years and Catherine Snow (2001) is still looking for *systematized knowledge*. That support and inspiration for me and the action

researchers in Grand Erie is Jack Whitehead. In addition, I want to make very clear that I was able to do all of these activities because Peter Moffatt¹⁷ was working with me to create that culture of inquiry and encouraging me in the processes. In the Action Research Kit video he said:

What will be necessary to make action research a vital element is the opportunity to dialogue and share. And I think that is where some of the system supports can come into place. And so, as Director of Education, I think we can support action research by facilitating the dialogue, by seeing that people engaged in any form of research are given the opportunity to share their findings on a stage that they are comfortable with. And certainly research projects involve the need for additional resources, or financial or technical I think the system can facilitate it. I guess the best thing you can do to support action research at the system level is to create a culture that values research and that recognizes the research that has been carried out and the fact that the teacher is the person best situated to conduct research on learning and improve education (DeLong & Wideman, 1998c, transcript, p. 7).

That is the overview. Now I will share the variety of supports that I have created to support and sustain action research, to get the voices of the teachers and administrators heard and published and to build a culture of inquiry, reflection and scholarship. First the networks that I initiated and developed and now are sustained through the leadership of Cheryl Black, Heather Knill-Griesser, Paula Rasokas, Dave and Lynn Abbey and Karen McDonald.

¹⁷ See Chapter 1.

The Networks: Brant Action Research Network (BARN), Cayuga Action Research (CAR) and Simcoe Action Research Team (SART)

It was at a session that Jack Whitehead was giving to my 'Leaders of the Future' program that he asked me (in front of the group, of course), "What kinds of sustained support are you providing the leaders so that they can continue their research and learning?" The issue of *sustained support* is one that has stayed with me and comes to my attention any time I think some effort or program is *done*. It was with this prompt that in September, 1997, I sent an invitation to the system inviting staff to BARN, modelled after the Bath Action Research Group but with monthly meetings as opposed to weekly. Each session included a presentation with the early presenters from the Group of Seven and some dialogue and varied in size from ten to twenty participants. In terms of what made the difference in attendance at these meetings, it seemed that careful timing to avoid busy times of the year like report card writing, interesting presentations like 'Using the Internet for Research' and having food available were contributors to higher attendance.

During the 1997-98 school year, I led the groups and as Elaine MacAskill, teacher consultant, gained confidence, she took more and more ownership. In the workshops, Elaine worked with Fran MacLean, who was vice-principal at Banbury Heights, one of the pilot schools, to teach the process and coach staff afterwards. This was a frustrating year because of the political unrest and the teacher strike that lasted two weeks but impacted on activities for months before and after. When we did get things going in the January, the group varied from ten to twelve. One of the changes I made in the second year was I added an additional meeting just for follow up from a workshop session on an aspect of the action research process and for informal sharing and dialogue. I used Jean McNiff's (1988; 1992) publications and You and Your

Action Research Project (McNiff, Lomax & Whitehead, 1996) as well as the kit (Delong & Wideman, 1998) for teaching the research process. A new tool I used that year that Linda Grant had given me was Field-Based Research: A Working Guide (B.C. Ministry of Education, 1992). Also this year I was giving new attention to teachers who were conducting action research projects as part of their teacher performance review (TPR) process. I had managed to get the action research process as part of the TPR system and had the begrudging support if not encouragement of members of Executive Council. One of these teachers was Cheryl Black.¹⁸ Her project, Developing Self-Esteem: An Action Research Project (1998), inspired many others to take up the challenge to research their own practice in addition to the benefit derived by Cheryl and her students.

In 1998-2000 I was consumed with the work of the amalgamation of the school boards.¹⁹ Cheryl provided the leadership for BARN bringing together the group. She also was the system leader of CAR and SART although there were local leaders in Elaine Cooper, Paula Rasokas and Peter Rasokas. We described our research of this process in our paper for ICTR 1999: How can we, as teacher and superintendent, improve our practice by assessing our influence on each other in our roles as educational leaders and critical friends? (Black & Delong, 1999). The culminating event, a dinner meeting on June 22, 1999 for all three groups, was two presentations, one by Heather Knill-Griesser (2000) from BARN and Lori Weins (2000) from SART. Both of the presentations were reviewed and published in the spring 2000 issue of the Ontario Action Researcher electronic journal (OAR), guest-edited by Cheryl Black and Peter Rasokas (2000).

In 2000-2001, Cheryl Black and Heather Knill-Griesser were co-leaders of BARN with Heather, now teacher consultant, beginning to pick up more of the load of

¹⁸ See Chapter 2.

BARN. I was pleased to see the succession in such capable hands. Both SART and CAR also had capable new leaders – Paula Rasokas and Karen McDonald. In 2001-2 Karen McDonald was joined by Christine Stewart, program consultant, in the leadership of CAR and that group, the one that was slowest to start, in 2002, is now the fastest-growing.

Simcoe Support Action Research Network (SSARN) and Covey Action Research Team (CART)

After a number of workshops on the process of conducting action research given by Jack Whitehead and me in my new family of schools, I set up support groups that I committed to work with myself even though I was finding direct involvement very difficult since amalgamation and fewer superintendents. I wanted to get action research into the culture of the areas of the board other than Brant. Starting in September, 1999, I met once a month with two groups who accepted an invitation to dialogue about their action research projects: five program support staff from the Simcoe School Support Office and six people who had taken the Covey Seven Habits (Covey, 1992) training in July, 1998: five principals, two from the former Brant Area, one from the former Haldimand area and three from the former Norfolk area, and Brad Kuhn, Elementary Teachers' Federation of Ontario (ETFO) Executive Assistant. Because I wanted to clearly demonstrate support for research-based professionalism in my area office and connect it to the Covey training, I committed the time to these two groups. They were willing learners and came with commitment to the process and thoughts and writings to share. It was informal and frequently I provided lunch. For a first year group, I was pleased that two written projects from SSARN were submitted for review. Several of them came to the year end session on June 22 and others

¹⁹ See Chapters 1 and 2.

committed to finishing written projects. One of my regrets was that I was not better prepared for the sessions but perhaps because I have a penchant for organizing everything, their informality was their strength!

Voices of Principals



Rick Denton, Greg Buckles, Dave Pyper, Jesse McDonald, June Ayrhart, elementary principals, members of the Voices of Principals action research group. I have known them for 10-15 years.

Linda Grant, OPSTF Executive Assistant, invited me to conduct a research study with principals using action research. OPSTF would fund the production of a paper on the role of the principal for use in responding to the declared intention of the provincial government to remove principals and vice-principals from the union. I began in January, 1997 working with a group of seven elementary principals, five from my family of schools and two others, all volunteers, all of whom had responded to an invitation to research their practice. Elaine MacAskill, program consultant, Career Education and Community Relations, joined the group in April. The once-a-month sessions were a combination of dialogue around the process of researching your practice and the roles and responsibilities of the principal. Sometimes I listened; sometimes I talked about the process; sometimes I facilitated dialogue on themes and metaphors. The sessions were taped and transcribed and I frequently asked for written feedback on how I was doing at facilitating the process. All that year, 1997, we made progress on getting their stories written and published. One principal asked to

withdraw after a few sessions citing discomfort with producing an adequate story and I readily gave her permission to leave but kept the door open for her to return. I didn't think there were any hard feelings because near the end of the work, she came to hear how we had done.

Six principals produced six wonderful stories, some more ready to publish than others. I had planned to pull the publication together with Elaine in August of 1998. Like the 1999 Act Reflect Revise conference, obstacles got in the way: Elaine moved to be a vice-principal in another board; Linda moved on to the Ontario College of Teachers (OCT); the principals had their own issues to resolve; I was surviving amalgamation and new responsibilities. This was, however, my responsibility and I had failed to fulfill it. Not like me. It haunts me to this day. It's easy to say that in the pressures of change, things get lost but it doesn't salve my conscience and it doesn't fade away. A failure doesn't feel good. However, there is new hope. In a November 21, 2001 e-mail, David Pyper, one of the group, requested the unedited book for an Ontario Principals' Council Committee examining the work of principals. This is clearly one of those "stories of ruin" (Lather, 1994 in MacLure, 1996).

I did, however, learn a great deal about supporting action research. This was my first group since the action research pilot group. Several sessions at the beginning were committed simply to building a supportive atmosphere where it was safe to talk about your values, beliefs, concerns and failures. The attendance at the sessions indicated their enjoyment of the sessions and commitment to the project. I worked hard at letting them find their own way to express their values and explanation of their professional lives. As I said, "I want to avoid being prescriptive so that your stories will be individual and true to your lives. There is no model for telling your story" (transcript of session, April, 1997). They were willing gatherers of data around their practice. The most difficult part was getting them to write their stories. I met with some of them

individually to see if I could help get them writing. Greg Buckles who was one of the group who responded with trepidation to the writing process.²⁰ Gradually during the summer and fall of 1997, some stories started coming in and Elaine and I reviewed them, gave them feedback and in the fall there were four completed stories and then by early in 1998, all six. I was beginning to realize that I needed to find a way to get the action researchers writing earlier in the process. This was confirmed for me in working with Cheryl and BARN.²¹

Now I want to talk about the conferences that I have planned and/or supported so that teachers' and administrators' voices would be heard and their research and learning would be shared on comfortable platforms (Moffatt, 1998) and in supportive communities.

CONFERENCES

I. Act Reflect Revise, 1997-2001

The Ministry of Education Innovation Fund money was allocated for the 1995-96 school year but Linda Grant and I knew that we could manage to stretch it out until Christmas of 1996. On the plane to New York AERA in April of 1996, we talked about next steps and decided to run another Act Reflect Revise (ARR) forum in 1997, this time in Brantford and to make it self-sufficient. The conference involved many of the same players -Jack, Tom, Lynne, and Ron. The exception was that by the time of the conference, Marg Couture, Executive Assistant at OPSTF replaced Linda who had taken a new job at the Ontario College of Teachers. Also Jean McNiff was going to attend. I was a member of the conference planning team, introducing speakers and leading several sessions.

²⁰ See Chapter 2.

²¹ See Chapter 2.

I have never been able to just do one thing at a time. Ron and I used the conference as an invitation to participants to contribute to a second publication of action research projects as part of a kit that would include a video. During the forum, board program staff organized interviews with fifteen participants taped by a local photographer to log over six hours of tape. As if organizing that wasn't enough, I also scheduled a meeting of my validation team-Jean, Jack, Tom, Linda, Andre Dolbec for University of Quebec in Hull and Peter Moffatt (transcript and video 23/02/97). In addition I chaired a meeting of an action research symposium group with the same group with the addition of Marg and Jack MacFadden, president of Ontario Education Research Council. (transcript, 23/02/97) Jennifer James (1996) says, "Entrepreneurs and those with what I call 'menagerie minds' create resilience by always being immersed in a variety of projects and interests. They never depend on only one way to energize themselves, solve a problem or earn a living" (p. 43). I'm not sure those around me think I create resilience but I do get energy from a variety of projects and interests.

The evaluations of the conference were so good (ARR II Evaluations, 1998) that another ARR forum ran in Grand Bend in April of 1998. Again Jack, Tom, Ron and I were involved. From Brant, presenters included the Branlyn and Banbury teams, the compensatory education project with Ruth Mills (2000), the Voices of Principals with Greg Buckles and Dave Pyper, Elaine MacAskill on beginning action research and Ron Wideman and I presented the Action Research Kit (1998) which had just been released.

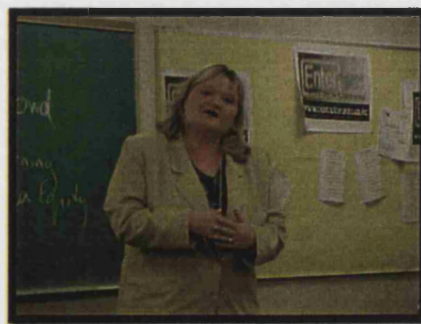
Just when you think you can assume something is a 'fixture', it falls apart. A third forum planned for April, 1999 in Waterloo County failed. It failed for lack of registration but mostly because of staff change and overload – all of us – Marg Couture, Ron Wideman, Waterloo staff, me – were in the throes of upheaval and

amalgamation. These conferences are dependent on the local team and in this case the Waterloo superintendent who contracted to support the conference retired and no one picked up the responsibility. However, we learned some things about what we needed to do for the next one. So I talked to Marg Couture in June, 1999 and offered to hold the Act Reflect Revise Forum on February 17-18, 2000 in Brantford. A conference team of friends and colleagues and a plan was in place: Cheryl Black to chair the committee with Grand Erie staff, James Ellsworth and ETFO representatives; Jack Whitehead would be keynote speaker; Peter Moffatt to give the luncheon address; Marg Couture and ETFO would manage the contracts, marketing and registration; Ron Wideman would be a facilitator.

These pieces came together very quickly because of my conference-planning knowledge, my past experience with the ARR, my academic and professional networks and the critical mass of action researchers in the board: a combination of knowledge, experience, relationships and connections. The personal relationships and experience make projects like this enjoyable. Then a transition took place with the combination of ARR and OERC Conferences.

II. Ontario Educational Research Council Conference, (OERC), 1997-2001

Since 1996, wherever I've been involved in educator groups, I have taken the action research process with me. My involvement on the Ontario Educational Research Council (OERC) Board and my work on the annual conference is another vehicle for supporting action research. I encouraged and supported teacher researchers to present their research at this conference for the years of 1999 and



Nancy Carroll, grade 3 teacher, Houghton Public School presenting at OERC, 2000 on her research on her practice.

2000 and brought Jack Whitehead to speak to the gathering. At the 2000 conference, fifteen Masters students (teachers, consultants and school administrators), four consultants and three teachers presented their action research projects and three other teachers attended with my support. The Grand Erie District School Board (GEDSB) group represented a significant number of the group in attendance.

The value of getting teacher researchers to present and be publicly accountable for their learning is captured in “Cohort Story: Re-Searching Together” by Robert Ogilvie (2000), one of the Master’s students. I had worked hard to get them all in attendance at the OERC conference in 2000 in terms of finding the money and organizing the sessions with Jack Whitehead, but the benefit was clear:

We are lined up side by side in a manner that reminds me of Monday Night Football where players introduce themselves in little video clips....

Phillip Sallesky, Intermediate core French, Grand Erie District,...negotiating curriculum.

Janie Senko, Grade 5, Grand Erie District,..... integrating curriculum

Marilyn Davis, Secondary English, Grand Erie District.... improving student writing.

And so it goes, through all thirteen of us.....not linebackers, quarterbacks and kickers, and hardly the Miami Dolphins, but a real team nonetheless. We are the Brock/Grand Erie Masters Cohort, and seated in a row on either side of Jack Whitehead, we recite the litany of our names, jobs, and thesis/project topics to the assembled audience at the 2000 Ontario Educational Research Council conference. I am the

first to speak and as we move down the line I am at first attentive to the audience, but then quickly drawn back to a focus on us, for I am forcefully struck by how articulate, clear and confident we have all become. This is not at all the nervous, halting and uncertain group which began together fifteen months ago, and I wonder yet again about the process that has enabled this to be so.” (p.1).

I know from my own experience of presenting my work and holding myself accountable in a public forum that the preparation is as important as the actual presentation. A great deal of learning goes on as I try to synthesize what I’ve learned from my research and the dialogue with the academic and practitioner groups is invaluable in moving my thinking onto the next stage. Marion Kline articulated the same experience.²²

In December 2001, Ontario Educational Research Council Conference, 2001,



The 2001 OERC Conference team: Peter Rasokas, Heather Knill-Griesser, Cheryl Black, me, Karen McDonald, Lynn Abbey, Geoff Suderman-Gladwell, Dave Abbey.

Brantford, Ontario:
Co-Sponsored by
Grand Erie DSB and
York Region DSB:
“Improving Student
Learning: How Do I-
You Know?” again

shared the knowledge base of the practitioner-scholars in GEDSB and other boards. GEDSB staff constituted half the participants and half the presenters.

²² See Chapter 4.

III. International Conference on Teacher Research

Each of the years 1997-2001, at the International Conference on Teacher Research attached either at the beginning or end of AERA, the quality of teacher presentations in researching their classroom practice has impressed me. For the 1999 ICTR in Magog, Quebec, I sponsored, with financial assistance from GEDSB, ETFO and Ont. ASCD, four GEDSB staff to attend the conference: one principal, one vice-principal, one elementary and one secondary teacher. I felt particularly proud that two classroom teachers, whom I had coached through action research projects, Lori Barkans (Squire & Barkans, 1999) and Cheryl Black (Black & Delong, 1999), made presentations. Lori presented with Fran Squire on their work in developing the standards for the College of Teachers and Cheryl and I presented our joint research on supporting action research as a self-improvement/professional development model. Both of the teachers



Cheryl Black and I presenting at ICTR in Magog, Quebec, 1999 our research on our influence in supporting practitioners to research their practice. Note our pleasure as we enjoy working and sharing our experiences.

wrote their research papers as a result of their interest in action research and with the active involvement and support of another researcher.

I have vivid memories of the workshop session which Cheryl and I led which was advertised as a special session for administrators (ICTR brochure, 23/04/99). We planned the session to be experiential by having them write in journals about a recent incident in their lives that conjured up strong emotion so that they would have a deeper understanding of the

potential of action research to tap into their values on education. As we were teaching the action research process using their sharing of those incidents, Cheryl was doing her part of the workshop when she lost her train of thought. I didn't know whether to step in or hope that she would get back on track. I was afraid that if I moved into her part, she would lose confidence. Also with my being in the perceived 'power position' (she, the teacher; me, the superintendent), I worried that the group might be offended by a misuse of power. As I discussed in Chapter Two, Cheryl and I have explored the power issues frequently and feel that beyond our caring relationship, our ability to work in a collegial way, our joint papers, which include both voices (Black & Delong, 1999; 2000), demonstrate our collegial way of being.

It had never occurred to me that she would be intimidated by the situation. It might have: here she was presenting at an international conference for the first time. When she wasn't getting back on track I filled in some pieces and carried on. I don't think anyone was aware of the lapse. It has occurred to me since that here was a perfect example of a time when my high expectations were simply unrealistic. I need to remember that. There were a number of interesting events in that workshop made up of administrators as well as university academics with the exception of Lori and Cheryl. In the session I said that sometimes my expectations are set too high when I am supporting action research and people feel pushed. Lori Barkans put up her hand and said that that had not been a full picture of what I do. She said, "That's just not the full story. Jackie never asks anyone to do what she hasn't done herself and provides incredible supports if you choose to accept the challenge that is offered." That comment meant a great deal to me being unsolicited as it was. It was particularly significant because I had been privately critical of Lori when she had asked for financial assistance to attend ICTR because she had not been involved in an action research project that year. Later at the social event we talked and she informed me that

she had taken on other responsibilities of late but was planning to engage in a new project.

I felt very affirmed as a practitioner-scholar when a psychology professor from McGill University came to me after the session and said, “I hope you will keep up this work. I don’t think you understand how important it is. I know of no other superintendent who is doing this kind of work.”

Sometimes the most significant learning goes on when it is not part of the agenda. I was unable to get a ride back to Montreal to catch my flight so I took the ‘hump’ in the middle of the back seat of the car driving the four home that I had supported to attend. On the way back the dialogue was just outstanding and part of sustained support for inquiry and reflection. It was not just our shared learning but the relationships we built that makes doing our work together easier and so much more enjoyable.

In 2001 in Vancouver, I was on an international panel with Gaalen Erickson, Joe Selese and Ian Mitchell on issues in teacher research. Jack Whitehead taped the session and made a CD-ROM of Gaalen’s three questions to the panel, on the doing, sustaining and communicating of teacher-research, and my responses. The CD-ROM is part of our exploring the potential of multi-media CD-ROM presentations for research and continuing professional development and the process of explicating the meanings of embodied values in explanations of educative influence. A combination of visual representation and text seems to enable me to get closer to an understanding of the ways in which my embodied spiritual, aesthetic and ethical values influence my own learning and the learning of others. In the CD-ROM you see the way in which Gaalen Erickson’s questions stimulated my thinking and my answers. It is difficult for a text on its own to communicate the meanings of my embodied values but I feel that you might more clearly see the life-affirming energy (Bataille, 1962; Whitehead,

1999) and delight I feel and am communicating to others in the particular clip where I am talking about the 'SWAT' ²³ team response to supporting teacher-research.

An important connection that I made at ICTR was with Fran Halliday who now manages staff development in the Western Quebec School Board in Quebec. We met through Jack Whitehead when she was at Bishop's University. I presented to her principals in Montreal in 2000 and on April 19-20, 2001, two teachers, Trudy Gath²⁴ and Janie Senko presented on a panel and I gave the keynote address. These connections give the teachers opportunities to share their learning and to get the affirmation they deserve.



Heather Knill-Griesser, primary program consultant, Masters grad, BARN leader. I have known Heather for five years.

The ICTR held in Montreal on April 5-7, 2002 followed AERA in New Orleans and came to be because Fran Halliday picked up a failed plan to hold it in Florida. Because of the timing, I did not attend but I encouraged and supported Donna Howey (Howey, 2001), a grade 1-2 teacher and novice researcher and Heather Knill-Griesser, program consultant, experienced researcher and BARN leader (Knill-Griesser, 2001), to present

their research. In conversation with them on April 17, 2002 at a BARN meeting, I could hear that the experience of sharing their research on an international stage validated their learning. In the description of the session, I can see my influence:

²³ See later in this chapter.

²⁴ See later in this chapter.

April 6, 2002
Presentation by Donna Howey and Heather Knill-Griesser
History of Action Research in The Grand
Erie District School Board:

Jackie Delong (Superintendent of Education for the Grand Erie District School Board) was an advocate who exerted a system's influence. Jackie was:

- I. internal to the organization and understood the inquiry process.*
- II. provided networks and individuals with needed resources (workshops; release time; video equipment; professional literature).*
- III. brought people together in the form of action research networks to support each other and sustain inquiry - each network had an experienced chair person.*
- IV. built capacity one person at a time (Howey & Knill-Griesser, 2002).*

ORGANIZATIONS

I. Ontario Association on Supervision and Curriculum Development (Ont. ASCD)

During my years as a director of the Ont. ASCD, I encouraged the group to make action research a focus of the activities. There are several indicators that I was successful in doing this. Ont. ASCD was a sponsor of and actively involved in ARR II held in Brantford. During 1997-98, when Ron Wideman and I were the editors, the focus for the newsletter was action research and Peter Rasokas and Elaine MacAskill

made action research a focus of the newsletters when they were editors in 1998-00. Ron and I were invited to conduct a full day workshop in Ottawa on August 22, 1998 on Action Research for about thirty educators and there is now an active action research support group in Ottawa.

II. Ontario College of Teachers (OCT)

In 1997, Linda Grant was appointed Manager of Standards of Practice at OCT and had the responsibility for the development of these standards:

The College is responsible to the public and the profession for ensuring teachers receive the training they need to provide Ontario's students with an excellent education now and in the future. It sets standards of practice and learning for teachers and accredits teacher education programs and providers (OCT, 1998).



Fran Squire, OCT officer responsible for the investigation of action research in developing the Standards of Practice. I have known Fran, a true reflective practitioner, for five years. She is now teaching at the University of Ottawa.

Linda brought her knowledge of education and action research to bear in the hiring of *the right person* (Bennis & Biederman, 1997), Fran Squire, Program Officer, who had just completed her doctorate in reflective practice (Squire, 1997) and who was charged with developing the Standards of Practice for the Ontario College of Teachers as they related to Action Research. Lori Barkans was a teacher representative on the committee assigned with that responsibility. Fran involved Brant/Grand Erie educators in the validation of the draft standards and as writers of stories to give life to the written standards as Jack Whitehead and I had hoped (Delong & Whitehead, 1998).

My role was to organize appropriate groups to meet with her. The first group who met on January 28, 1997 was Brant action researchers and they wrote about their experiences in action research and where their experiences were reflected in the categories of the standards. The second group met on two occasions in 1998 and the members came from all areas of the new board, some with and some without experience with action research. They all told stories of their professional lives that were prompted by specific standards. I had a number of purposes in these meetings: to make staff aware of the new Standards of Practice; to keep our connections and public profile with provincial bodies; to help Fran with her work of making the standards meaningful; to start building personal and professional relationships and culture of inquiry, reflection and scholarship in the new board; and to contribute to work that might keep the Standards from becoming mere “linguistic checklists” (Delong & Whitehead, 1998).

On this last point, as the standards were being produced, Jack Whitehead and I had been in frequent contact with Fran Squire. At the time of the release of the draft standards, we wrote a response to the questions Fran asked in her paper presented at the International Conference on the Self-Study of Teacher Education Practices in the U. K. in August 1998 (Squire, 1998):

1. *What implications arise when standards of practice are linked to action research endeavours?*
2. *How do we keep the spontaneity and individualism inherent in action research as we establish criteria for its recognition in the educational community?*

Our response which was presented at the OERC 40th Annual Conference in Toronto on Dec. 4, 1998 and subsequently published in *The Ontario Action Researcher* (DeLong & Whitehead, 1999) incorporated the U.K. experience with similar efforts by the Teacher Training Agency. It also included the research that Cheryl Black and I had conducted and that I had included in the paper to my validation group (DeLong, 1998). We presented this challenge:

Our challenge is that each one of us should take the responsibility to share a story/case study that makes one or more of the standards exist in our images of our selves in our educative relationships with our students and colleagues (DeLong & Whitehead, 1998).

The irony is, as I mentioned in Chapter 2A, that here I was doing the very thing I was railing against: using the standards as a checklist to see if Cheryl and I measured up to the OCT standards of practice. I was, and Cheryl was, a living contradiction. (Whitehead, 1989). What the exercise does tell me is that even in the hands of someone of good intention the application of the standards can be mechanistic and lose the real quality of the life of the professional educator.

HOW HAVE I INTEGRATED A CULTURE OF INQUIRY AND REFLECTION INTO THE SYSTEMS OF THE BOARD?

In all of the systems that I am responsible for, I integrate that vision of creating a culture of inquiry, reflection and scholarship into portfolios and staff that I'm directly (and sometimes even indirectly) influencing. Whether you look at compensatory education, teacher and principal performance reviews, staff development, leadership, assessment or policies and procedures that I present for Board approval, the connections and relationships in that vision is evident. First, building that culture through my role in compensatory education.

Compensatory Education

Because of my interest in equity issues in particular for children in low socio-economic schools, Peter Moffatt assigned me the responsibility for compensatory education. During the 1995-96 school year I worked with a committee to come up with criteria for accessing a \$35,000 board fund for compensatory education. The seven schools that met the criteria of a compensatory school committed to choosing a strategy to improve early literacy, conducting action research and then reporting to the board on how well their strategy had worked. During the 1997-98 year I worked with curriculum support staff in the Brant area to train teachers in action research processes and then supported them to write and report. School administrators like Greg Buckles (1999) and Ruth Mills²⁵ (1999) were exemplary in their efforts. All of the schools reported in June 1998, although it was a struggle for schools that lacked the leadership of people like Greg and Ruth. I managed to convince Executive Council that we needed to continue the work for the next year and the \$35000 was sustained for second year. Part of the reason was the politics of there being a reading program called Reading Recovery in the other two areas of the newly-amalgamated board and no program for early literacy in the former Brant area. I invited the same seven schools to commit to the same criteria and all but one agreed. The one school said that they found the action research process too demanding. I was up to my ears in work so I just let that go without investigating. **I feel badly about that but there has been little time to backtrack.** I was right in the middle of the stress of amalgamation.

With my transfer to my new family of schools and no regular contact with the Brant schools, Ruth Mills, vice-principal of one of the schools who had learned action research from BARN and my workshops, took on the responsibility to lead the group

²⁵ See Chapter 2A

and do the training. She did a wonderful job of ordering the literacy materials and coaching them in action research as there were new teachers and principals who were unfamiliar with the processes. Indicative of the number of changes that were going on, Ruth was moved to a principal's position and left that school during that year. Despite the loss of the sustained support, two of the six schools reported and I just didn't check on the rest (Mills, R. in Delong, 2001b, p. 261). Even though many of the projects did not get to the writing and sharing stage, the emphasis in the classroom by the teachers held benefits for the improvement of learning. I could look at this as a story of ruin (Lather in MacLure, 1996) but given the fact that I had been removed from supporting the projects to focus on amalgamation, I was pleased that two came to completion. There was money left in the account at the end of the 1999 school year and I gave it to the two schools - Woodman-Echo Place and Graham Bell -Victoria - that reported so they were rewarded for their diligence and could continue into the 1999-2000 school year. I figured that that kind of commitment deserved more resources to improve learning for students.

Let's look now at integrating action research, reflection, inquiry and scholarship into staff development.

Staff Development and Leadership Programs

In my portfolio responsibility, Staff Development encompassed all employees for the board as well as the staff development model but the actual workshops for information technology, curriculum and special education in-service was the responsibility of the superintendents with those portfolios. I supported the action research in-service and support groups under this umbrella and budget. Also I worked with Maria Birkett²⁶ to provide staff development to the non-educator groups (accounting, purchasing,

²⁶ See Chapter 4.

secretarial, facilities staff) and at crossing educator/non-educator boundaries. This can be seen in the inclusion of non-educators in the Covey workshops where an emphasis was on self-evaluation and building relationships. A major part of this portfolio was leadership programs. A full description of the action research aspects of those activities can be found in the GEDSB Staff Development Model¹ as well as the integration of that culture of inquiry and reflection through various parts of the document. In the 'Assumptions' we have written: "The Board supports self-directed staff development which encourages reflection, innovation and risk-taking". In the 'Guiding Principles, it reads: "Sessions need to be meaningful and relevant for adult participants and include dialogue, interaction, application and reflection" and "Opportunities for dialogue, research, sharing of ideas and networking are important staff development strategies". And "Strategies for Conducting Effective Staff Development" include: "Encourage and support action research to improve practice" (DeLong, 2001). This model, and its concomitant policy and procedures, represented the work of a very enjoyable committee in 2000-2001 and my many years in professional development.² This integration can be seen as well in curriculum and assessment activities. Assessment was part of my assignment but curriculum was another superintendent's portfolio.

Curriculum and Assessment

The core question in everything I do is: "How is this improving student learning?" And, of course, the follow-up question is: "How do you know?" Whether you look at the Professional Development sessions at Family of Schools meetings or the criteria for leadership selection or the compensatory education projects or the analysis of the provincial test results, the same questions come up. It is a common understanding that

¹ See pp. 453-460 of the Appendices.

those are the questions I will expect answers to whenever a teacher or principal or community partner presents a project or direction. If I don't have the resources to support a project that has the potential to improve learning, I make a point of searching them out or making the connections so the individual can get the support s/he needs. The only catch is that I expect to see the results of the investigation.

Diane Morgan²⁹ and I conducted an action research project with the Pauline Johnson Family of Schools which we reported in Curriculum Directions (1998) on the results of the first Grade 3 assessment to answer just those questions. In June 1999, Diane and I submitted a request for \$17,000 for a research project for six teachers to analyze the assessment data for their grade to discover weaknesses in the program and investigate a strategy called "Corrective Action" (Sutton, 1997) through action research in the 1999-00 school year. When I presented it to Planning Council, a committee of principals and superintendents, I thought it had little chance of getting approval but I hoped to get the topic on the table for discussion. I was amazed and gratified to hear the principals talk about the essential nature of research proposals like it and, in fact, the need for a research officer in the board. Had the request failed, I had a back up plan to do the research through other budget sources. I really felt that day, July 5, 1999, that a culture of inquiry and reflection was beginning.

The 1999-2001 GEDSB Board Reports to the Education Quality and Accountability Office (EQAO) on Grade Three and Six Assessment make frequent reference to the focus on improvement of instruction and student learning through reflection and inquiry. These reports for 1999 and 2000 were exemplars for the province posted on the EQAO website. In the response from EQAO on our Board Action Plan, 1999-2000, the work in action research was cited as exemplary (letter dated, August 20, 2000). In addition, new curriculum documents produced by board committees: The

²⁹ See Chapter 3A.

Good Math Program and the Good Language Program refer to action research as a means to improve student learning.

An Action Research Approach to Improving Student Learning (Wideman et al., 2000), a full scale study that included GEDSB and North Bay-Parry Sound Catholic School District using EQAO test results as data for improving student achievement is covered later in this chapter.

And my last area for integrating action research is in teacher and principal performance review processes, an area that is not in my portfolio but which I influence by my input to policy and procedures and through its implementation in my families of schools.

Teacher and Principal Performance Reviews

In the former Brant area I managed to get action research included in the ways open to staff and principals to complete the Professional Growth Strand (PGS) cycle (every three to four years for competent contract teachers). I used it regularly with the staff that I supervised as did many of the elementary principals in my family of schools. Of the secondary principals, I am only aware of the one completed by Cheryl Black's principal (Wibberley, 1998). I don't think it was as common in the other families of schools. I also used the self-reflection and journalling part of the action research process with two principals whose performances were unsatisfactory and required improvement.³⁰

³⁰ See Chapter 2B.

In 1998-2001, in my new family I encouraged those interested to come to workshops, conduct their own action research projects and get support at SART meetings. Two principals, Peter Rasokas and Keith Quigg, worked through the action research process for their performance review in the 1999-2000 school year and in 2000-2001 six worked at it but only two completed the process, Virginia Chambers and Kim Cottingham.³¹ My hope is that this will become a part of the new performance review process that will be developed in 2002 and that the principals will work with teachers to start using it where teachers volunteer for it. Of course, ideally this will reflect on how teachers work with students to help them pose and answer their own questions. We know that it happened in Cheryl's classroom!³²

PUBLICATIONS OF PRACTITIONERS' RESEARCH

In the writing that I have done over the past five years, I have intended to influence the educators in Ontario to embrace action research as a means to improve student learning and the professional lives of educators. I have contributed writings to each of the organizations for whom I have worked. Also, still in the vein of developing a knowledge base from the work of practitioners and of providing 'sustained support', Ron Wideman, Associate Dean, Nipissing University, and I have made a concerted effort to publish educators' action research projects and to bring their voices into the public forum. The knowledge base of 'what is education', 'what is teaching', 'what is learning' and 'where is the path to improvement' is lacking the voice of the practitioners. In the video, "Action Research: Improving Schools through Action Research", Peter Moffatt, then Director of The Brant County Board of Education, said, "Teachers are the people best suited to conduct research on teaching and learning" (DeLong & Wideman, 1998c) While it is not my intention to deny the value of the

³¹ See Chapter 2B.

³² See Chapter 2B.

work of university researchers, if the knowledge of the practitioner is ever to be recognized as part of the 'real' as in 'academic' knowledge, more of these publications of teachers' and administrators' work must arise. Mine is not a proposal for exclusivity but of inclusivity. The voices of teachers must be included.

1. Ont. ASCD "Curriculum Directions" and Newsletter

Carolyn Bennett, President of Ontario ASCD and former professor at Nipissing University encouraged members to contribute their action research work for publication in that "There is growing recognition of the importance of action research to the professional development of teachers" (Bennett, 1998). In that issue, Diane Morgan and I (1998) discussed Grade 3 Assessment: What we can do with what we learned from grade 3 assessment and described the research we had done with teachers and principals on the results of the provincial testing. In summary, we noted:

Teachers need to take control of their own professional learning and to know that they have valued knowledge that should be shared with their colleagues. Parents and the community must become our partners in this most important endeavour. Working together in the schools and within the community is the path to increased accountability and confidence in our educational system (p.30).

We put forward six "Strategies for Improving Students' Achievement Levels", one of which was, "Developing and supporting a culture of reflection, collaborative inquiry and action research" (p.10-12).

During the 1997-98 school year, Ron Wideman and I edited four issues of the Ontario ASCD Newsletter all focused on action research (Delong & Wideman, 1997/98). Each issue featured an action research story or project from a teacher or principal. In

1998/99, Peter Rasokas and Elaine MacAskill, new members of the board of directors became the new editors of the newsletter and placed less emphasis on the publishing of action research articles. Such is the transitory nature of influence.

2. Act Reflect Revise Revitalize!



Ron Wideman, Associate Dean at Nipissing University, and I have been co-writers of many articles and a Kit, colleagues and friends for over 8 years.

The first publication from the Action Research pilot projects came out of a call for papers at the first forum in February, 1996 (Hossack & Halsall, 1996). All of the leaders agreed to write at least one paper and to support teachers to write about their projects. Ron Wideman and I first formed our writing partnership and described our concept of action research as a means to school improvement and to encourage teacher professionalism in “Action Research: School Improvement that Honours Teacher Professionalism” (DeLong & Wideman, 1996).

We had worked together on the review and writing of The Common Curriculum, Policies and Outcomes, Grades 1-9 (1995) in 1994-5 when he was the Project Manager at the Ministry of Education and I was an elementary principal. However, this was the beginning of our collaboration as writers.

In this article, we brought together my experience in supporting teachers in Brant conducting action research and his own research into the adult learning model,

Action research begins from the natural investigative process teachers have been shown to use when making changes in their classroom practices (Wideman, 1995). Action research makes that natural process more systematic and effective. The experience of Brant County staff indicates that the following factors support a practitioner engaging in action research:

- 1. a minimum of two creative, reflective teachers/administrators as critical friends*
- 2. a supportive administrator/principal who encourages risk taking and who celebrates successes*
- 3. a school culture that honours professionalism and reflective practice*
- 4. time to plan and to record one's research in a journal that includes observations and reflection*
- 5. information and in-service on how to*
- 6. frame a question*
- 7. collect data*
- 8. analyze data*
- 9. work with critical friends*
- 10. share the research process and results with others*
- 11. a self-generated research plan, including questions and research processes, validated through discussion with one's critical friends*
- 12. the capacity to publish and accredit the practitioners' action research and results (p. 16-17).*

In my article, "The Role of the Superintendent in Facilitating and Supporting the Action Research Process" (1996), I articulated one of my values of not asking people to try things that I'm not involved in myself as part of my commitment to building a culture of inquiry and reflection:

This article is an example of "Walking the Talk". It is my attempt to model the process of "Act Reflect Revise" and to share our learnings with other teachers, principals and superintendents. The action research experience invites us to model for others what we do. I want to demonstrate to the school staff with whom I've worked on this project that I haven't asked them to do anything I'm not willing to do myself. And some of my learnings, I learned:

- 1. that teachers' gut instincts are good;*
- 2. that teachers intuitively do the right things in the classroom; they fall down in the articulation;*
- 3. that there is incredible excitement created when teachers prove to themselves that what they are doing is valuable;*
- 4. that action research is authentic assessment;*
- 5. that action research reinforces self-esteem and is self-fulfilling for teachers;*
- 6. that it strengthens talent in the classroom;*
- 7. that research on improving teacher practice belongs with the practitioner in the classroom (p. 58).*

In addition, both of the pilot project teams contributed their stories of research and growth, the one teacher group on improving early literacy and the other on involving parents in their child's learning. It is interesting to note that the report of the primary teachers (Barkans, MacDonald & Morgan, 1996) is very personal and emotional and that of the intermediate teachers (Wilson & Churchward, 1996) is very much focused on the actual research process and yet the oral presentations were in both cases very personal and emotional (videotape, 1996). The report of the principal of the Branlyn

team, Jesse MacDonald (1996) "A Principal's Progress", showed his excitement, the potential of action research and his next steps:

I feel that Action Research can be a powerful motivation to the staff who have in the past felt uncertain of the change environment...The exciting part of action research is that it is a natural part of any thinking professional's actions. I still need to learn ways to introduce and excite other staff about their latent wishes to improve their practice. Perhaps the best vehicle for this will be the three "trail blazers" that made such a difference in our practices at Branlyn this year. Being given the opportunity to be part of this initiative has been one of the greatest opportunities for me to be a team member without having to be in the traditional principal role all the time (p. 57).

It is an impressive record of teacher and principal growth and improvement in student learning that would not be on record were it not for the OPSTF/ MET initiative and the influence of Jack Whitehead. It is interesting to note that Ron's and my early learning about the potential of action research stands the test of time, some six years later.

3. The Action Research Kit: Action Research: School Improvement Through Research-Based Professionalism

No sooner was Act Reflect Revise Revitalize (Halsall & Hossack, 1996) published than Ron Wideman and I started discussing next steps. As the date of the conference was coming up, we recognized a need to have a next generation of support for teachers conducting action research. Not satisfied to just repeat the print publication and recognizing as Jack Whitehead says of the other media:

You can actually start to analyze those fundamental human values that you bring into your human relationships which are really crucial to education but which you can't communicate easily just through the words on a page (Transcript of videotape, Delong & Wideman, 1998c).

Thus the idea of a professional development kit that would include a video was born and subsequently supported by OPSTF. To that was added Jean McNiff's generous gift, her 'how to' book: Action Research For Professional Development (1995). The whole professional development kit included two books (DeLong & Wideman, 1998b; McNiff, 1998) and a video program (DeLong & Wideman, 1998c).

The process of creating the kit and of our learning, our collaboration, our frustrations and challenges are described in the book, Action Research; School Improvement through Research-Based Professionalism (DeLong & Wideman, 1998b). In 'About This Book' we stated our purpose:

Our greatest delight is that we are providing a forum for teachers to share their learning through action research. Their stories are engaging examples of what is possible and valued in education. The voices of teachers need to be heard and have a significant place in the development of educational theory. We are also delighted by the quality of the contributions by educational administrators and teacher educators to the dialogue on action research. We want to celebrate and support the professional teacher taking control of his/her own learning, the process of school improvement and the development of educational knowledge (p. 11).

True to the intent of the text, our contribution was ‘walking the talk’ and we shared our learning in the project in “Learning from Collaborative Action Research: How This Project Has Contributed to Our Professional Growth” (p. 106). In the article we talk about our areas of learning, about some proposed standards of practice in action research, about the making of the video and about our future directions. We have followed up on all the next steps we proposed and have accomplished three of the four in the creation of The Ontario Action Researcher electronic journal (1998-2002).

The book contained work from teachers who had contributed in Act Reflect Revise Revitalize (Halsall & Hossack, 1996) as “Multi-Year Updates and Reflections” as well



Marg Couture, Executive Assistant, PD at OPSTF. A passionate supporter of action research and partner for Ron and I in publications. I have known Marg for 10 years.

as first year projects. In fact, sixteen Brant County staff, elementary and secondary teachers, principals, curriculum support staff, a superintendent and the director all wrote articles. Ron and I made final decisions on articles that needed revision, how the book would be organized, and the layout. Elaine and

I made sure all the articles were submitted on disk and, where possible, with photos, in a package to OPSTF. Marg Couture and the publisher produced an attractive book and the kit package.

We hired a local photographer to tape the interviews and shots of teachers in classrooms, and Ron, Elaine and I chose the shots, wrote the script, provided the narration and arranged for digitization of the video at a local studio, all for under \$500.00. As neophytes in video production, we described the learning process,

We chose to develop the book and the video using an inductive approach that gave voice to what participants felt important to

communicate. The video was developed from over 6 hours (actually 8 hours) of taped interviews as opposed to taping from a predetermined script. We learned that this made the editing process highly complex but it was worth it to communicate the integrity of educator's thoughts and feelings.

We included the video program in the package because video is a highly effective way to communicate the strongly-held values and beliefs of participants as a "living" message. The video is intended to support the book – many of the same people are represented in both. But the visual images provide a quality that print has difficulty capturing – particularly as Jack Whitehead says, in communicating the human values and sense of professionalism underlying people's work (DeLong & Wideman, 1998b).



Both of these are photos of the launch of the Kit. The photo on the left is March 26 at the University of Nipissing with Ron and on the right is on April 6 at the Brant County Board of Education: before and after learning of my potential demotion.



One of the areas that we stressed when we launched the kit in formal presentations at Nipissing University on March 26, 1998 and at The Brant County Board of Education on April 6, was that of 126 pages in the book, 100 of them were written by teachers. I was very gratified that the chairman of the board, Arlene Everets, and vice-chair, Lois

White, accompanied Elaine and me to the launch of the kit in North Bay, a trip that used up almost two days. They spoke with great pride about the kit and our work both in North Bay and again in Brant. Ironically just at a time when I should have been able to indulge in the celebration of a major accomplishment, I was facing the prospect of losing my job.³³ The value of keeping records can be seen in the difference in the photos of the two media events above and in the quality of my e-mails. I sincerely thought I was hiding my emotions at the time but the photos belie my intent and show the strain.

After the kit was published, Ron, Marg Couture and I (1999) published "What We Have Learned By Building a Collaborative Partnership" in the International Electronic Journal For Leadership in Learning (<http://www.ucalgary.ca/~iejll>) about the process of building the partnership between a university, a board of education and a teacher federation.

Abstract

This paper contributes to the literature on why collaborative partnerships between schools and universities thrive or fail. It describes what we have learned through a successful collaborative partnership among the Brant County Board of Education, Nipissing University, and the Ontario Public School Teachers' Federation. The paper describes the constellation of factors that influenced the success of the partnership. We had a clear and compelling cause and a history of collaboration that pre-dated the partnership. Our relationship was based on shared values, purposes and collaborative skills that enabled us to resolve issues of power and voice. We were able to influence decision-making in our organizations and they were able to cut through

³³ See Chapter 1.

*red tape to translate their commitment into effective action amidst a challenging provincial context.*¹

That partnership continues in The Ontario Action Researcher.

9. Ontario Action Researcher (OAR) www.unipissing.ca/oar

Once the kit was published, Ron and I considered how we would continue our work in providing sustained support. We did not want to repeat ourselves so another print publication was not considered but we did want to make use of the technology. Thus the idea of an electronic journal was born. We consulted with our partners – all in the throes of change – and found them willing to continue the moral and financial support. In this publication, Nipissing has taken on the largest part of the structural support in the allocation of technical staff to design and maintain the web site and to manage the receiving and sending our articles for review. Once Ron and I had the support of our organizations, we set about putting together an organization and systems to make it work. We created a board with directors representing our organizations and veteran action researchers and planned for the implementation. We decided on board meetings by conference call, draft purposes, the peer review process, the first issue and subsequent issues for two years, potential guest editors, general web site ideas for website designer, Mickey Sandula, and potential links to other sites.

From the birth of the idea in the spring of 1998 to the first issue in December, Ron and I exchanged many e-mails and telephone calls to produce this journal for action researchers. As we said in our article in the book in the kit, “We prefer working collaboratively rather than in isolation. And it is more fun. We find the synergy created by the collaborative process results in enriched thinking for both of us”

¹ See pp. 351-362 of the Appendices.

(Delong & Wideman, 1998, p.106). We wrote the editorials on a laptop in a meeting room at OPSTF or ETFO head office because Ron would make the four hour trip from North Bay and it was just over an hour of drive for me. We have worked regularly at improving the site, the reviewing process, the forms for reviewers, the turnaround time (which now is about 3 months) and expanding the location of the contributors. In the first and second volumes, most of the writers were from our connections in our organizations. The first two issues had projects from three teachers and one principal from Grand Erie as well as an article from Jack and I and one from Fran Squire from OCT. The editorials tell the story of the journal's progress. In the first editorial where we talked about our intentions:

We intend to provide an on-going forum for sharing action research studies and the growing knowledge base about the potential for action research to improve student learning and teacher practice.

Action research is an approach to school improvement that honours teachers' professionalism. Individually, and in groups, teachers identify questions about their practice, make appropriate changes, and collect data to discover the impact of those changes. They record their studies and share the results of their investigations with others. The key research questions are, "How do I improve my practice?" and "What evidence can I gather to demonstrate the impact of my work?" (OAR. Vol. 1, No. 1).

In the second, we made the connection between the OCT Standards of Practice and action research and our continued commitment to building that knowledge base from practitioners' research:

Action research is imbued with the process of self-assessment and evaluation and enables the teacher to act in constructive ways designed

to investigate and improve practice. If the teachers' action research projects are shared, a body of knowledge is developed over time that informs understanding of the meaning of the standards and enables their further clarification and improvement (OAR. Vol. 2, No. 1).

Our editorial in the third issue focused on our future directions. We were determined to invite more contributors from outside our own organizations so we started with the fourth issue to use guest editors. We were very pleased with the short turnaround to get the publication up and running and we met our expectations of putting out three issues in the first full year. We have tried to improve each volume and have included photos in the papers in previous volumes but next, we want to include video clips in order to communicate more clearly the values of the teachers. In 2001-2, we are planning for succession. We have found the next two editors, Cheryl Black and Kurt Clausen, and have a transition team of the four of us for the 2001-2002 year. Again the sustainability of the supports are essential to continuing to get the teacher's voice and knowledge into the public domain.

10. An Action Research Approach to Improving Student Learning Using Provincial Test Results

Another victory narrative (Lather in MacLure, 1996) is the story of my work with teachers using test results to improve student learning. It is a story of influence. As one of the principal investigators of An Action Research Approach to Improving Student Learning Using Provincial Test Results (Wideman, Delong, Hallett & Morgan, 2000), I supported teachers to improve their practice and student learning by using test results:

Abstract

During the 1999/2000 school year, seventeen elementary school teachers and five consultants from two Ontario school boards, conducted action research based on the 1999 EQAO provincial test results for Grades 3 and 6 and the use of feedback/corrective action to improve those results. Paired with a "critical friend", individual teachers analyzed their schools' results and identified areas for improvement. They identified action research questions, investigated the questions in their own classrooms, collected data to evaluate the impact of their work, and recorded their investigations. The teachers' own assessments and the 2000 EQAO test results indicate substantial success. Teachers began to see provincial test results as friendly data that schools can use to improve student learning, and action research and feedback/corrective action as powerful methods to do so. The study contributes to understanding how provincial testing can be used to improve student learning and what constitutes effective teacher in-service education.

The research of these teachers and the students' improved achievement, I believe, are evidence that researching your practice brings improvement in teaching and student learning. (See Chapter Five: Findings in Wideman, Delong, Hallett, & Morgan, 2000) This work, one of many collaborative works with Ron Wideman, was shared in a presentation at the Checkmark conference at the University of Nipissing on November 2, 2001 and at the OERC Conference on December 7, 2001 in Brantford.

8. **Passion For Professional Practice: Action Research in Grand Erie District School Board. (2001)**

James Ellsworth, Cheryl Black, Karen McDonald and Diane Morgan assisted me in editing a publication of the work of the action researcher projects in the Grand Erie District School Board during 1999-2001. It is a celebration of the knowledge base of the thirty-five projects from teachers and administrators in the district and the first run of copies sold out at the OERC Conference in Brantford, December 6-7, 2001. In January 2002, a second run was distributed to the trustees and schools in the district.

And the last of the supports and networks for inquiry, reflection and scholarship is the creation and implementation of the masters cohort group, a partnership with Brock University. With the addition of this program, the knowledge of the practitioner has been given added value through the accreditation process at the academy. One of the projects (Suderman-Gladwell, 2001) can be found on Jack Whitehead's website <http://www.actionresearch.net>.

ACCREDITATION: BROCK-GEDSB MASTERS PROGRAM

I wish to clarify how I want you, the reader, to approach this story of the master's cohort in the context of my story as a whole. This story is a part of my explanation of my efforts to create, support and sustain a culture of inquiry, reflection and scholarship through a professional model of staff development. I think that part of the sustainability is through the accreditation and the accreditation is much more feasible and enjoyable with a community, a cohort group, to support you. As well as showing and explaining the nature of my thesis, I feel that it is important to be just as clear about what it isn't going to address. While the sustainability point related to the cohort is most significant, there's another whole thesis analyzing the difficulties of accrediting new forms of educational knowledge in the academy.

Where did the vision for the program begin?

In the first two Act Reflect Revise conferences in 1996 and 1997, Jack Whitehead spoke to the large group audiences about the importance of getting advanced accreditation through masters and doctoral degrees for teachers' action research. Most of the group was not ready for the message at that time. In fact, one of the other speakers, Lynne Hannay, took him to task for emphasizing the value of formal over informal action research. It is important to recognize that in Ontario unlike many U.S. states, advanced degrees are not required, not highly-regarded and may even be resented in school boards. Part of this denigration comes as a result of the historically theoretical nature of advanced degrees and their perceived lack of application and connection to the real world of schools.

Part of my vision of what an on-site program might look like came from Jean McNiff at the Herstmonceux Conference in August, 1997. Jean showed me the work she was doing in Ireland in a partnership between a religious organization and the University of West England providing a masters program off campus and providing the support to a group of teachers. Besides being an action research degree, the program I envisaged would require a structure that would remove some of the obstacles that I had experienced that made it difficult for practitioners to conduct research and complete a degree. These included reduced driving distance, shortened timelines, cohort model for support and encouragement, reduced costs, school board moral, financial and technical support, and an available and appropriate vehicle for publishing the projects.

I had played with the idea of an on-site masters program in discussions with Queen's University in 1997. It didn't happen because at that time I wasn't far enough along in my thinking to work through the logistics and I didn't yet have the pressure of people

needing it. And then sometimes a marvellous synchronicity and synergy occurs. Seeing Cheryl develop in her understanding of action research and her emerging interest in school administration added to the pressure to bring a master's course to Brantford. She was ready for the accreditation of her knowledge and, to my mind, she clearly had the capacity. At the same time, I felt that the documentation of the impact she was having on student learning was essential to get accredited by the academy, published and shared with the educational community to broaden her influence. And I felt that there were others like her wanting the accreditation. Over the period of the four years of a growing critical mass of action research in the district and with Cheryl in mind, I saw indicators that there might be a growing clientele for a masters program, another means to building a culture of inquiry, reflection and scholarship in the school system.

How did we create the program?

I looked for a Dean of Education who would be willing to break out of tradition to offer an action research masters program. I had tried out the concept on Susan Drake, professor from Brock University, about a year prior and while she liked the idea, she felt her institution was not ready. Then we met at the Ontario Education Research Council Conference on December 5, 1998 and again discussed the possibility over

dinner with Jack Whitehead and Ron Wideman. Susan said that she felt the time might be right because the new Dean, Michael Manley-Casimir, was welcoming innovation. I encouraged her to talk with him and if he showed interest to set up a meeting with



Michael Manley-Casimir, Dean of Education, Brock University, designer of new student-focused programs. I have known Mike for three years.

the three of us. To my surprise, a meeting was set. I went to the meeting feeling that realistically the idea was a long shot.

The three of us met in Michael's office. I described a master of education program restricted to a cohort group of Grand Erie staff to be held on-site using the action research process. Michael not only listened intently to my proposal but also suggested that we move immediately to a seminar room so that we could design a program on the display board. We mapped out a list and sequence of courses over two years using the courses in the university calendar. Michael would teach the first course and Susan would teach the second. We would need more help as time went on. We discussed asking Jack Whitehead to teach the Action Research course in the spring. It was only the beginning of a political process to get the program offered that I was unfamiliar with. **Once again I was reminded of the limited transferability of systems knowledge - knowing one system like a school board does not mean knowing a system like a university.** ³⁵

The next major hurdle was presenting the proposed program to the Graduate Studies Department. Both Michael and Susan were concerned about the resistance that could be expected from the group. Michael first presented the proposal to that group. It was given tentative approval with questions to be answered and then had to get full approval of the department on March 10, 1999. I would be in San Francisco for the Association for Supervision and Curriculum Development Annual Meeting/Conference but I agreed to return early to participate in the presentation. I was totally unprepared for the resistance and obstacles presented. They included the fact that the staff was already stretched too thin, students would be drawn away from another program, cohort groups are too insular, it was contrary to policy to partner

³⁵ See Part A of this chapter.

with one school board and concerns were expressed about the rigour of qualitative/practitioner research.

I naively thought that university personnel held loftier values and set students and program needs above territoriality, loss of power and fear of change. These very human responses to change reverberate across groups and organizations. A change is a crisis. It is an important learning for me that I need to recognize that and deliberately remind myself each time I am attempting to change something, no matter how apparently small it seems to me. This has become more apparent to me as I have come to realize that I need and enjoy change, particularly change of my own making. Even when the change is forced on me and appears to be negative, the outcome is that it is an opportunity for me to learn and grow. Amalgamation was a case in point.

By lunch break at the Graduate Studies meeting, it appeared that the negative forces were winning. I felt that there was a meanness about the dialogue which I found disappointing. I guess I expect more altruism among academics: just my usual naivete. Gradually a compromise appeared to form: the program could run if it was not restricted to the Grand Erie Board staff and it would be a pilot requiring a report at the end of the first year. We could live with this, especially when we could control the advertising and admit the first fifteen who were qualified and who applied. At a celebratory dinner that night, we planned our next steps and another meeting.

What were the organizational issues?

On March 31, 1999, Michael and Susan came to make a presentation to interested students in Grand Erie. I was worried because my reputation was at stake since I had in essence said that we could find the staff interested in taking the program. Imagine

my joy when over forty people came, but I still had the worry of how many would register. Out of the group who came to the initial information meeting, seventeen applied. On June 2 we met to review the applicants. As we poured over the applications, there was only one that was in dispute. Susan and I wanted to accept one candidate despite a mediocre academic record and Michael felt that it might be unfair pressure on the person given the strength of the group. Susan and I convinced him to give the candidate the opportunity to decide. The student decided to accept and has done extremely well.

And a very interesting group they were. A high percentage were from Visual, Dramatic and Music Arts backgrounds; one trained in a seminary; one was a rookie teacher; most were experienced teachers with a balance from elementary and secondary schools. On June 17 we met to set dates and to select readings for the fall course which we called, "Personal and Professional Ways of Knowing". We brought our favourite articles and chose ten to go to the bookstore for printing and copyright. The program started in September, 1999 and was held at The Teacher Resource Centre in Brantford on two Saturdays a month during the work year and two days a week for four weeks in July.

Later that week, June 20th, 1999, I met with Peter Moffatt to review my goal package for the year. During that meeting I said to him that I was still amazed that I could sit in a meeting with two university academics and feel completely at ease. He said, "I'm not surprised; you have studied your practice and the action research process in depth for over three years."

On July 12, 1999, Michael e-mailed me to ask if I would teach the second day of the course because he would be away. I agreed. Then Susan and I designed and taught the Narratives Course and the Reflective Practice Course from January to March, 2000

and September to December. Jack Whitehead taught the Proposal course in the May-June.

What problems arose with the ethical review process?

Setting out on a new course is exciting and creative but often feels like trying to fit a square peg in a round hole. Making this innovative program fit into university traditions was an exercise in frustration. Most issues that caused conflict and consternation were easily solved. Having to submit marks in a particular range at awkward and prescriptive times was an irritant but having to follow ethical guidelines that were totally inappropriate for the action research process was the ultimate test of “creative compliance” (Whitehead, 1999). I am shaking my head even now as I remember the tension that I felt at recommending at one Saturday session (Oct 21, 2000) that the group “play the game”. This was contrary to my values and I was clearly a living contradiction (Whitehead, 1989). I tried to justify my recommendation with the promise that I would work to get this process amended, knowing full well that that would take much more than my influence.

Geoff was able to be analytical as he wrote to Jack Whitehead about his intention to make this ethical review issue the subject of his research:

Jack,

As part of my project, I want to trace what I see as the conflict between the values of the university as expressed in the standards used to judge the ethics of our action research inquiries, and the values that we are expressing in our proposals. Specifically, there are the calls for confidentiality and non-identification, provisions for non-participants, provisions for power relationships, and other values such as the need to return participants to the original state, and the value of

"objectivity." All of these factors are either irrelevant, impossible, or meaningless in the context of self-study. Since many of the inquiries in the group reflect your understanding of action research, I need to trace the roots of your understandings. It seems to me that Habermas, Schon, Polanyi among others would give insight. Apart from your own writing, where else should I look for the roots of your concept of action research?

Thanks, Geoff Suderman-Gladwell (e-mail, 2001).

This resonates with Tish Cotty's struggle as a teacher-researcher in standing firm in her own educational standards of judgement (Dadds & Hart, 2001).

I think the words of Trudy Gath, one of the masters students, in her January 2001 paper tell the story of the ethical review process and her refreshing attitude of taking



Trudy Gath, core French teacher, Masters grad. I have known Trudy for three years.

advantage of any opportunity to learn (her use of bold print):

Upon a response to my proposal from the Research Ethics Board, my perceived progression came to a screeching halt. The Ethics Board rejected my proposal, as I had thought they would, but they wanted me to change and clarify fifteen aspects! My first reaction was extremely negative, as I took their response

personally. (I have to learn not to take things personally.) Upon reflection, I tried to see what I could learn from the experience. From my journal:

I feel like I am going to scream and never stop once I begin. I just received a response from the Ethical Review Committee for my research project. The Committee, all high and mighty, says that I need to resubmit my proposal. They sent me a list of fifteen items that need to be addressed before I may have permission to proceed with my work. I see that they expect me to explain, explain, and explain until I am blue about how I can continue to study my own practice.

I am so upset by this because now, I will spend another four hours or so explaining, revising, photocopying, and wasting paper when I could be reading relevant material that pertains to my topic, literature that may help me to improve in what I am doing! I am angry at the fact that I need someone from a committee to give me permission to research my own practice! I am fuming at this setback.

From the above setback, I learned to try to understand the position of the Ethical Board in that they have a job to do to ensure the safety of human participants in research projects. I realize that I cannot be a special exception to the bureaucratic rules that exist. I must exercise “creative compliance” and just work around this obstacle. After all, I have managed to overcome many other obstacles before. Regardless, I must push on with my research in my own, very ethical, ways. To my great relief, my proposal was accepted by the REB last week.

Discovering that my anger can be productive, rather than destructive makes me feel better about my emotions because I feel they are helping me to learn. I am learning that one must know oneself before lasting changes and improvements can be made in practice. “Clearly, self-knowledge makes a difference; it provides us not only with the tools to

learn but also with a foundation for all we do with students” (Cohen, 1999, p.19) (p. 3).

I agree with Trudy. I find anger is a useful emotion if I use it to motivate me, incite me to respond in productive ways to improve my practice and the social order (McNiff, 1992). Such an event occurred on November 3, 2000 at a presentation of the Ontario Ministry of Education and Training (MET) at a regional meeting of The Ontario Public Supervisory Officers Association (OPSOA). After a full morning of provincial directors of MET telling us that what we thought mattered little since the government was going to implement its mandate irrespective of our concerns and only if we were particularly devious would we influence decision-making, I became increasingly outraged. The final straw was the description of the plan for teacher testing and accountability. After four years of work by Linda Grant and Fran Squire and many others at The Ontario College of Teachers (OCT) to develop standards of practice for the province, the MET had taken over the task to once again develop standards of practice.

When I asked if this had not already been done, the presenter seemed surprised that anyone noticed this redundancy and indicated that the past work would be taken into account and that the new standards would be more useful for implementation. In any case, a project team was being hired to create these more ‘quantifiable standards’ to ensure uniformity and accountability across the province. It was useless to push any further and one is naïve to go head to head with a government this powerful and insensitive. However, I know that I have and can create space strategically for professionals to be *creatively compliant* (Whitehead, 1999).

The more I thought about this, the angrier I got. As I analyzed my anger I recognized that I was the problem and the solution. I was a living contradiction. I needed to get

my thesis done and contribute to that evidential base of living educational standards of practice and judgment and I needed to exhort the masters group to the same end. In an interview, McGill University ethicist, Margaret Somerville said: "Sometimes, it is unethical to avoid controversy" (Greenspan, 2000, p. A23). That indictment appears to be true of some of our politicians as well as of me.

Therefore, at one of the Saturday sessions, I told the story of this incident to the masters students. I stressed to them the significance of what they were doing in researching their practice for the purpose of improvement in student learning. External standards deny what we believe but we are so weak in the exemplars. I exhorted them to write and publish their living educational standards of practice so that we, as professional educators, can demonstrate to the politicians and the public that we are professionals who hold ourselves accountable. We need the evidential history that is a track record in practice. Just articulating the theory of being accountable or of how it might work is clearly insufficient and not compelling. The projects of the masters group will provide the exemplars and build that evidential history (Black, 2001). At the same time that I was asking them to articulate and publish their standards, I committed to doing the same.

What co-ordination and power issues arose?

I do not wish to forget the implementation problems that had to be solved on a regular basis. There were the site problems: photocopying costs, access to building on weekends, upsetting the office coordinator with garbage left on the weekends. Implementation problems included tensions around an outside lecturer who came from another research paradigm, changing expectations in the products of the courses and around my involvement in the program.

There were stressors associated with being off-campus. When Michael, Susan and I discussed the parameters of the cohort masters program, I was very certain that the site

needed to be in the school district. What I had not foreseen was the difficulty of joint instruction and performing as a team. Michael was the Dean and therefore this program was not his only priority; Susan and he were on campus and I was off campus and therefore out of the conversation much of the time. And I was not a professor, just a part-time instructor. Therefore, planning was a challenge.

Let me say very clearly that I thoroughly enjoyed teaching the two courses, Reflective Practice and Narratives, with Susan. The student evaluations of the Narratives course were excellent and I just didn't hear about the other. What I want to do here is show one of the difficulties that arose in this type of off-site cohort program. One week when Susan was not feeling well, she asked me to take the lead on the Saturday program. I prepared and shared the agenda. When she arrived she was feeling better than anticipated and regularly interrupted and amended the plan that I had prepared. And then announced to the group that contrary to what they had been told the week before that only she and Michael would be supervisors. This came as a surprise to them and to me. One part of me felt relieved that I could focus on my writing but another was angry at the insensitive way that I had been informed. I think that I am a good team player and partner and I tried not to show my confusion to the group but I felt angry. Over lunch I asked Susan about this turn of events. Because she had been away the week before and thought she was conveying Michael's direction, she said that she was unaware of the impact of her actions. She apologized to the group and me and said that she would get direction from Michael.

In the midst of feeling moral outrage, I reminded myself that I had made an error in the winter of inviting Jack Whitehead to teach the Action Research course in the spring of 2000 before we had made a final decision as a team. Michael brought this to my attention and I apologized because he was right. Another example of the difficulty of this arrangement.

While I know 'power issues' can arise at any time, I was not prepared for it to be a factor in the masters program. After what appeared to Jack Whitehead and I to be a highly successful experience at the OERC 2000 Conference, over dinner on the Friday night Michael announced that I could no longer be involved in instructing the program because some of the students had come to him to say that they were uncomfortable because of "power issues". **We have a difference of perception on this: Mike says that I offered to withdraw. He may be right but I am certain that I had no intention of not being involved in the program prior to that meeting.** To say that I was upset would be an understatement. Here I was espousing a value of non-hierarchical and democratic relations and being accused of exerting negative power. Later Cheryl sent an e-mail to Michael asking him to resolve the issue with the cohort group. (Black, e-mail Jan 30 01). His e-mail to Cheryl and to the group contextualized on the issue of 'conflict of interest':

Date: Jan 30, 2001 from Michael Manley-Casimir to Cheryl Black.

Hello Michael,

I debated for a while before sending this email. A number of people in the cohort have been asking me where Jackie is and/or what she is up to. I've tried to be rather vague. I told Heather that Jackie is no longer directly associated with the group, however, I don't feel comfortable telling anyone else. Jackie asked me not to say anything and I don't want to betray that confidence. Is this a concern that needs to be addressed with the group? The introduction of other research options and Jackie's absence are causing people to begin to put two and two together.

Cheryl

Yes, I became aware of that tension at the last class meeting. As you know from the previous e-mail [before Christmas] Jackie chose to withdraw because I raised the concerns of some students that they felt she presented a conflict of interest...I can certainly speak to this issue at the next class if you think this would help...it does seem to me that the cohort is entitled to know what happened... from my point of view, [as I think is also Jackie's position,] the central concern is that each student complete the degree with a credible project and experience, and from Brock's point of view [which I get to define and interpret] that is essential....anyway please let me know what you advise...Mike¹

I wondered where the issue of 'conflict of interest' lay. Was it that members of the group were intending to make unethical statements about their colleagues in schools? If so, then I felt good about bringing that to the forefront. Action research must be an ethical process and not an avenue to air grievances without recrimination. I considered bringing the issue into the open at the session on February 24th when I shared my paper entitled "My Living Educational Theory: My Standards of Practice/ Standards of Judgment"² but I was conscious of the personal relationships which I valued and of making the group feel uncomfortable. Despite several attempts at clarifying what 'power issues' meant, there has been no clarification forthcoming. To this day I have no clear understanding of what caused my severance from the program and Cheryl and I and Jack Whitehead and I have discussed it many times to no avail. With Greenleaf's (1977) "test of prudence in the sense of being cautious, circumspect, or discreet" (p. 211) in mind, I may have to accept that it will remain unresolved. I am reminded of

¹ Michael Manley-Casimir has given permission to use this.

² See pp. 384-428 in Appendices.

Donald Schön's reference to the 'artistry' of reflective practice as "the close link between expert action and understanding which occurs whenever we deal sensitively and effectively with 'situations of uncertainty, instability, uniqueness, and value conflict'" (Schön 1983: p. 50). In other works, 'artistry' is required on all those many occasions when there is no simple general rule, no 'right way' of doing things (Winter, Buck & Sobiechowska, 1999, p.2). I think this was a situation where there was no general rule and where I spent much time in the 'artistry' of reflective practice.

How did the students evaluate the masters cohort program?

I include some of the helpful suggestions that Cheryl Black and Heather Knill-Griesser (2001) have made for future cohort programs:

More small group sharing and analysis of stories or, for validation and presentations, would perhaps be a better use of our time. A group of 16 for validation presentations can become a bit unwieldy. It allows some people to dominate the conversation and others to hold back.

More class writing exercises could be based on the books mentioned above. Smaller assignments such as those we wrote for the narratives course, helped us to find our writing voice and I think gave us some confidence in our writing.

In order to maintain flexibility, sometimes the expectations were changed many times throughout the course. That was frustrating for those of us who planned ahead to get things done on time. Finding a

³⁷ See Part A in Appendices.

balance between flexibility and 'flying by the seat of the pants' is tricky but should be attempted. Along the same line, criteria for assignments sometimes changed. Rubrics to assess completed written assignments would be helpful, where appropriate (p. 2-3).

How did it go and where to next?

At a presentation on the last day of classes, July 6, 2001, Marion Dowds said, "Thank you for making your vision our reality":

Thank you for using imagination to conceive the vision of the cohort group which has been such an important part of our learning and our lives for the past 2 years, and for modelling your own learning for and with us. Most importantly, thank you for putting into practice transformational leadership, the ability to effect change through the creation of the cohort group. One of the writers who has become a hero for me during these past 2 years is Thomas Green. Writing about the voice of conscience as imagination Green says this voice leads to a 'vision which, if acted upon, will change the future.' You have shown us this achievement is possible.

July 5 on behalf of the members of the Masters Cohort

Best wishes, Marion.

I thanked her and Michael and Susan for their support for the vision. That journey from initial support to begrudging and tenuous support to proceed and the ethical review process was a bumpy ride through the Brock University Faculty of Education.

Without Michael's commitment it wouldn't have happened. Bob Ogilvie (2000) described my intentions with the Masters cohort:

[It was] the brainchild of Grand Erie Superintendent Jackie DeLong in the spring of 1999. She envisioned a co-operative venture with a university which would provide an opportunity to both further her work in action research and develop a more coherent leadership pool within the Grand Erie Board" (p. 9).

The partnership met the standards that I had written for the board (DeLong and Moffatt, 1996) that it be of mutual benefit, ethical and improve services and programs for students. The university and the school system benefited from the group of students conducting good research, research that would improve the practice of the teacher-researchers and the learning of the students in their classes and contribute to a culture of inquiry, reflection and scholarship. The ingredients that made it work were mainly the same ones that Marg Couture, Ron Wideman and I (1999) had experienced and written about in The International Electronic Journal of Leadership in Learning (IEJLL): "What We Have Learned By Building a Collaborative Partnership":

As project leaders, we had a history of collaboration; Our relationship is based on shared values, purposes and collaborative skills; a challenging provincial context made the partnership important to our organizations; we were able to influence decision-making within our organizations; and our organizations were flexible enough to translate their commitment into effective action.¹

As I plan for the next master's cohort partnership, I am taking into account the recommendations of Heather and Cheryl and my own experiences to build an even

¹ See pp. 351-362 of the Appendices.

better program. I believe that my naivete has developed into a more insightful understanding of the issues of getting a practitioner-researcher's masters program legitimated by a university and I see a growth in my own understanding of the literature on 'paradigm wars' and the contested nature of what counts as educational knowledge. I feel that I have been in what Habermas (1976) called a 'legitimation crisis' and that I am much more aware of the difficulties of agreeing on what counts as a definition of a professional standard of practice and what counts as valid evidence to show the standard in practice (OCT, 1998; TTA, 1998).

In thinking about Gary Anderson and Kathryn Herr's article in the 1999 June/July issue of Educational Researcher, I feel that we have done what they are suggesting as a way to improve schools and the accreditation process: a school board/university partnership. I recognize that there remain many issues to solve in the partnerships between school districts and universities. I hope that you agree that it is a fascinating story that could contribute to our insights into some of the problems and possibilities of getting embodied/living forms of educational knowledge legitimated. It is a contribution to the 'scholarship' debate (Schön, 1995) and the need for a new epistemology of practice.

How am I educating social formations?

Part of the reason that I can now take a secondary role in the support of action research is that I have helped to develop a culture that supports it. Even when I am not physically present, people feel my presence through my systems influence. I am there in a direct sense through the budget and moral support but not always in physical presence. Even though I was no longer actively teaching the masters group, I made a point of getting invited to share my writing so that they would know that I might not be there in person but I was still in the background caring about them. My

commitment to freeing teachers to tell their stories is a part of the system. The spiritual and aesthetic qualities that I espouse and model can be seen to pervade the system in a communal sense. Carolijn³⁹ talked about the “SWAT” action research team calling her to join. Lynn Abbey and James Ellsworth carry the spirit, the aesthetic value of a caring, supportive organization but the SWAT team lives in Grand Erie!:

I talked to John Verbakel and I emailed Dave Abbey. Nowit was like magic!!. All of a sudden I was swept up by the action research SWAT team. James Ellsworth called me and asked me to be part of a portfolio team receiving funding for action research. Several special dates were discussed where training would be given and opportunities to share with other practitioners given. Dave Abbey emailed me back with all sorts of suggestions. Lynn Abbey phoned and agreed to be my "Critical friend" or Mentor as we like to call it. John agreed to let me go on several PD days for my project. I knew that I was in a learning curve here and it is really exciting. I am going to really think things through before I meet with Lynn on Monday.

(MacNeil, C. e-mail of March 14, 2001: her journal entry of October 2000)

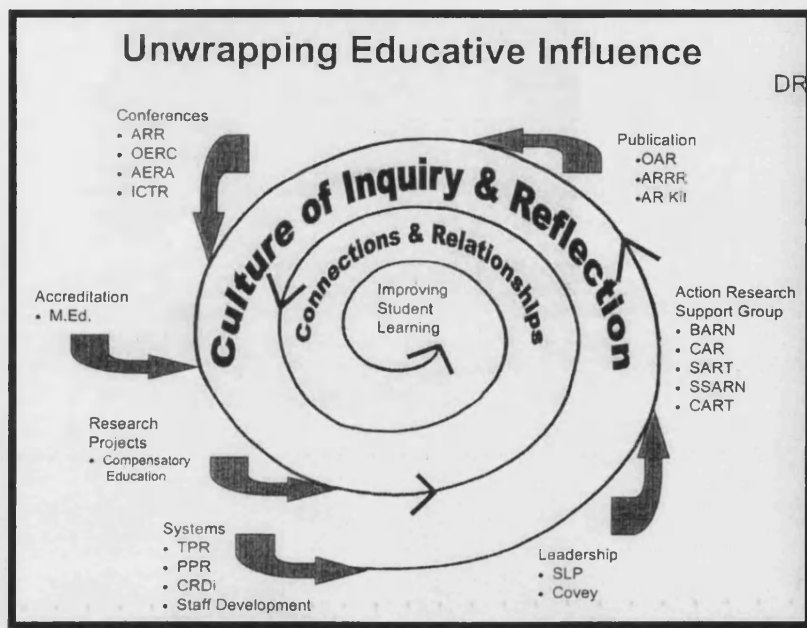
I had a vision but not a blueprint in terms of “educating social formations” (DeLong & Whitehead & DeLong, 2001) through my contributions to a culture of valuing the other and building a culture of inquiry, reflection and scholarship in a transformatory rather than an imperialist process that stifles individuals. Said (1993) talks about the importance of narratives in the development of culture and that we are inclined to forget that culture includes both the positive – “each society’s reservoir of the best that has been known and thought, as Matthew Arnold put it in the 1860’s”- and negative sides of its development:

³⁹ See earlier in this chapter.

Now the trouble with this idea of culture is that it entails not only venerating one's own culture but also thinking of it as somehow divorced from, because of transcending, the everyday world. Most professional humanists as a result are unable to make the connection between the prolonged and sordid cruelty of such practices as slavery, colonialist and racial oppression and imperial subjection on the one hand and the poetry, fiction and philosophy of the society that engages in these practices on the other (p. xiv).

When Cheryl Black and I presented our paper at ICTR, 1999 in Magog, Quebec, we described our work together in supporting action research groups over two years. In addition, I shared a visual that I had constructed of my work over four years enhancing the capacity of the system to support action inquiries and where Cheryl had provided leadership in the broader frame. Below is that visual which shows the various groups, structures, systems, publications that I had created to support action research across the system and province.

At the centre is "Improving Student Learning" since teaching and learning is always my focus. I am reminded of the statement of the speaker at the 1997 AERA Superintendency SIG session that superintendents are only interested in their careers and not in children and learning, a statement to which I objected. It is through



relationships and connections to build a culture of inquiry and reflection that I influence the system. Outside the shell is the environment of waves that I felt could represent the variety of ways in which I have supported and integrated action research across school systems. Under the headings conferences, publications, support groups, leadership programs, accreditation, projects and systems policies and procedures, I listed the waves that wash through the shell and affect the centre-improving student learning. My capacity to support action research has grown from the days in 1995 with the Group of Seven to a “critical mass” (Moffatt, 2001) that it is apparent in many aspects of the organization.

One of the significant vehicles for supporting action research has been through steadily increasing and more stable budget allocations. To start I found bits of money in various budgets and then I worked to get budget for supporting practitioner research. Although for the 2000-2002 years I managed to get a discrete budget of \$60,000 from the Educational Change Fund, long term I need to continue my efforts to incorporate it into the base budget.

And last, and most significantly, while I was supporting action research activities with the encouragement of Peter Moffatt, the Director, the work never actually appeared as one of my responsibilities in my portfolio until September of 2000 as “classroom research”. A significant event.

While my intention in the implementation of research-based professionalism (Whitehead, 1989) in the system was entirely in a vision of good, the impact of my drive and task commitment was sometimes viewed as imperialist, as “pushing”. Would there be as strong an action research movement in the board without that pressure and support? (Fullan, 1993). I doubt it but the examination of these power issues provides an insight into my synthesizing capacity, the aesthetic of the way I give form, as an artist gives form, as well as my use of power.

In reference to Couture (1994), Maggie MacLure (1996) asks, ‘If he’s right, what must we have forgotten in order to tell these smooth stories of the self?’ I want to take care that the story I tell of the growth of action research in the Grand Erie District School Board is not a “smooth story of the self.” My tenacious hold on moving toward a vision of a culture that supports research-based professionalism has not made me popular with some of my colleagues. The progress has been made at great cost, physical, emotional, and intellectual, to me. It has been a passion of mine for seven years. Sometimes leadership is hard on the ego and sometimes it is so affirming that I

am amazed at the sheer pleasure it brings. The pleasure comes from seeing a teacher like Cheryl Black⁴⁰ or a principal like Kim Cottingham⁴¹, sharing their own living theories of their work in improving student learning in their schools or classrooms.

Perhaps the most important way in which I support action research is that I do it. For a senior administrator to be 'walking the talk' is empowering for staff. When I share my research I show myself willing to be vulnerable especially in the democratic evaluation processes.⁴² These are not always "victory narratives" and sometimes are "research as a 'ruin', in which risk and uncertainty are the price to be paid for the possibility of breaking out of the cycle of certainty that never seems to deliver the hoped-for-happy ending" (MacLure, 1996). This kind of opening up to real feedback on my performance also has the benefit of breaking down the hierarchical structures that can impede learning both in this context and in the classroom. As I teach the process to the principals or to the masters group, I can speak with the "authority of experience" (Russell, 1995), having done it myself.

I continue to support action research as a means to fulfill my vision of a learning organization where staff, students and community have the programs, services and ethos in which they are supported and encouraged to take risks, improve themselves and create a good social order (McNiff, 1992). I feel strongly that the potential of teacher/action research to improve school effectiveness and capacity for change (Stoll & Myers, 1998) in the current climate of accountability is great and largely untapped. Teacher research (in its broadest sense) can create a dissonance that is "not only inevitable, it is also healthy and necessary for change to occur" (Cochran-Smith & Lytle, 1999, p.22). In attempting to assess and synthesize my life and learning and to share those learnings, I feel as Oliver Wendall Holmes, Jr. who once said: "I don't give

⁴⁰ See Chapter 2A.

⁴¹ See Chapter 2B.

⁴² See Chapter 2A.

a fig for the simplicity of this side of complexity, but I would die for the simplicity on the other side" (Peck, 1997, p. 15).

In this next chapter, I engage with some of the literature on educational leadership as I describe and explain my life as a senior manager and create my own epistemology of the superintendency.

Chapter Four

CREATING MY EMBODIED KNOWING IN BEING A LEADER

Chapter Four connects my learning from experience, the creation of my embodied knowing as a leader, my integration of ideas from the literature on leadership and my support for individuals to develop their capacities as I discover and manage resources to support visions of an improved educational system. I conclude by emphasizing the importance of my knowledge-creation in my professional practice as a Superintendent of Schools and by asking and answering the question: Why is there no simple or even complex answer to “what is educational leadership?”

In the rhythm of the work, my efforts are often full of risk, sometimes disastrous, at which point I fall back, renew my energy and with my recognized tenacity, try another route. I will reveal as well how I carry that spirit, that life-affirming energy (Bataille, 1962; Whitehead, 1999) embodied in my whole being with a passion and internal power to effect good. Feminist Barbara Du Bois (1983) writes of "passionate scholarship" as being "science-making, which is rooted in, animated by and expressive of our values" (p. 113) (Belenky, et. al., 1986, p. 141). One of the reasons I can accomplish as much as I do is that the work and the relationships appear to be many and complex but because they are inter-related and connected they provide a synergy that produces results in numbers of seemingly different and unrelated focus areas.

I find that as I am supporting individuals like Cheryl and Greg¹ and Maria² and Kim³ in dialectical and dialogical processes that I am learning and improving myself and at the same time educating social formations (Bourdieu, 1990). I hold onto a vision of a whole system dedicated to the learning of everyone in the organization, but most

¹ See Chapter 2A.

² See later in this chapter.

³ See Chapter 2B.

especially the learning of the students. That vision is wrapped up in an ethic of inquiry, reflection and scholarship, of valuing the other in a relational leadership as I create my living educational theory (Whitehead, 1989, 1993, 1999). Working at a systems level is a study in the complexity of cultures and historical relationships and a test of political *nous* to tap and enhance its resources and influence the way the organization works.

I begin with a narrative of my relationship with one of my staff, in this case a non-educator, Maria, Training and Development Officer who worked with me in staff development which includes leadership development programs.

WORKING WITH MARIA



Maria Birkett,
Training &
Development
Officer, 1998-
2002. I have
known Maria for
over three years.

When I think of leadership, I think of the people that I work with and the ways in which I encourage and support them and what they have taught me. To share my experience in staff development I must share an image of Maria Birkett so much a part of my doing and learning and caring.

As I wrote in her performance evaluation, it has been one of the purest pleasures of my career to support and encourage Maria Birkett's career development (DeLong, 2000a). When the decision was made by Executive Council to hire a Training and Development Officer who would not be a teacher, I had reservations. I argued that it needed to be a teacher to have the respect of the staff and to have the capacity to do the job. I was wrong on both counts. As part of a team who interviewed and offered Maria, a human resources secretary, the job, I was very clear on the expectations as I wanted her to fully understand that it would be a challenge. She looked me straight in the eye and said she would give it her best shot. What a lucky day for me! From day one, she poured herself into the job, asking questions, investigating possibilities, taking initiative, and building relationships. She has

superior interpersonal and organizational skills. I remember her saying in the interview that the one part of the job she could not do was to conduct workshops. We laugh frequently about that because within six months she was doing them as a partner with another staff member and after a year in the job was doing them frequently without taking much notice. Here again this recurring theme of my having faith in the other and their willingness to attempt what they thought was beyond their capacities with my support and finding abilities they didn't know they had.

One of the areas that we focused on in her role was staff development for the non-teaching groups in the board, an area that had been neglected in the former boards. These included secretaries, non-union managers and educational assistants. Maria's background and connections were invaluable in this work. She managed entire Professional Development Days, Volunteer Development and Summer Institutes programs creatively and competently. The other area of her work was support for leadership programs. Because of the severe shortage of school administrator candidates (Carter, 2001), a provincial problem caused by large-scale retirements and lack of interest in the job, this was top priority work for me. Each of the leadership programs had a program committee but Maria was their support system. Supports included web site connections, committee meeting arrangements, program locations and advertising, conference planning and constant problem-solving. The only time I saw her upset was when someone expected her to do secretarial work. She is calm, caring, competent and her eyes laugh with joy. In April, 2001, she left on maternity leave for a year. I miss her but thinking about her always makes me smile. What I learned in supporting Maria I used to support the interim Training and Development Officer and I look forward with anticipation for her return in April, 2002.

STAFF DEVELOPMENT AND LEADERSHIP PROGRAMS

Now back to leadership and staff development. I have a long history of experience in professional/staff development including a provincial award from the Ontario Secondary School Teachers' Federation (OSSTF) in 1988. While I have read about

staff development (DuFour, 1991; Sparks & Hirsh, 1997), much of my knowing is experience-based and embodied. Putting my life into discrete compartments such as 'Leadership Programs' for the purpose of this thesis is not easily done. However, I do recognize that part of my role as a superintendent is to compartmentalize for the purpose of particular tasks. And thus, when the board requires a report on leadership programs, I am able to make that report in the form and timelines expected (DeLong & Moffatt, 2001b). When I presented the new Staff Development Model I made the relationships and connections amongst staff development and leadership and inquiry, reflection and scholarship evident to the trustees of the board. The Staff Development Model¹, developed in 2000-2001 by a team of educators and non-educators, articulates the assumptions and guiding principles for professional development programs and, as well, incorporates the connections among, and work of, the leadership programs, the action research networks, administrator recruitment processes, and opportunities and means of accessing teacher and non-teaching staff in-service programs.

On July 10, 2001, I conducted a session on staff development with the thirty-two prospective principals on the Ontario Principals Councils' Principals' Qualifications Course (PQP). I realized in the preparation and in the dialogue in the session that this Staff Development Model represented not only my passion for and commitment to professional development but also my belief in involving those affected by decisions (Sarason, 1995). In the session I asked the group to reflect on and share their beliefs and values on professional development. I then shared the ones that the committee had agreed upon as a reflection of the process that had been followed to come up with our board's model, policies and procedures, a process that they could use in a school. One of the candidates on the course remarked that the positions of the committee members were not listed. I asked him what he thought that said about the system. He replied that he felt it showed respect for the individual's contribution and that position didn't matter. I replied that I was happy with that reflection of my system and that it had been Jennifer Faulkner, an Educational Assistant, who had spoken for the committee

¹ See SD Model: pp. 453-460 in Appendices.

at the board presentation. If the process is about learning and growth, then every opportunity should be taken to do that.

Part of my regular practice is that I ensure that staff members get the credit for their work and public forums like board meetings provide those occasions. When program or service reviews are conducted, the report is presented by a committee member, often a trustee, and I am the coach (DeLong & Moffatt, 1997b; 1999-2001; 2001b) I remember John Moore, Purchasing Agent, remarking at one of the professional development committee meetings when I shared with the group that policies should enable and free staff to do their jobs to the best of their ability that he had never heard policy described that way. And he liked it. This narrative demonstrates my standards of inquiry, reflection and scholarship and valuing the other through democratic and non-hierarchical relationships.

INTEGRATING THE LITERATURE ON LEADERSHIP INTO MY PRACTICE

The values, processes and standards of judgment that I use are embodied in my ontology and evident in my ways of knowing as a leader. When I visualize a preferred future, the faces of the people involved are first and foremost and I am thinking of ways to help them improve what they are doing, not by doing for them but by encouraging and supporting their own questioning and reflection. When I can help others do a better job I am moving the system forward toward an improved version of itself. When I encourage and support leaders in the organization, I am creating sustaining systems and succession planning. Essentially I am doing myself out of a job by supporting their independence and interdependence. Fortunately, there are more jobs than I can do in a day and others for me to move on to. I would like to emphasize the positive influence which some thinkers and researchers have had on me and how aware I am of using their ideas.

The work of Stephen Covey (1989; 1990; Covey et. al, 1994) has been very influential in my working from the inside out, in making relationships and planning 'quadrant

two” priorities, in seeking first to understand the other and in listening empathetically. In all the readings on leadership that the Reading Group that Diane Morgan and I initiated and supported from 1995 to 1998, and that Peter Moffatt supported and sometimes attended, no writer has had a greater influence on our system. In the year 2000, this influence was evident in the fact that two principals, Don Backus and Keith Quigg⁵, were trained to conduct workshops on the Seven Habits of Highly Effective People (Covey, 1989), over two hundred staff teachers, administrators, non-educators and School Councils members attended the training workshops. All of these people volunteered for the training. The values and philosophy are becoming part of the culture of the Grand Erie District School Board (Cottingham, 2001).⁶

WHAT I’VE LEARNED ABOUT LEADERSHIP IN THIS ROLE

What I think I’ve learned about leadership I can share with others but I would be concerned if anyone thought I have a model or prescription to follow. I find leadership to be context specific, dependent on the gestalt and very much a problem solving, creative thinking and relationship-building exercise. In Amanda Sinclair’s (1998) work on ‘doing leadership differently’ there is delightful rhetoric but no evidence that anyone has done leadership differently in her book. The kind of leadership that I



Linda Grant, OCT Manager, responding to my paper, ‘ My Epistemology of the Superintendency’, February 18, 2000 at my Validation Group meeting at the ARR Conference.

believe I am living is based on the living standards which I use and ask others to use in judging my way of leading. **I want to note here that I first wrote ‘use to develop in others’ and remembered Linda Grant’s recommendation at the February 2000 Validation meeting that she didn’t think I meant that I thought I could ‘develop’ others. I agree. I believe I can open some doors and offer opportunities**

⁵ See Chapter 2B.

⁶ See Chapter 3A.

but they must have the will and commitment to improve. I include this in order to integrate the methodology of this thesis and my emerging epistemology. I have been learning and developing my expectations and living standards of practice with Peter Moffatt, Director of Education, over many years but researching to improve them over more than six years - 1996-2002. They have evolved in a dialectical development of my own ideas on leadership and engagement with others. I was able to articulate at the Act Reflect Revise Conference IV on February 18, 2000 that I am what I have learned and experienced as a leader. I said that I like to foster the creative capacity in each individual in the same way that I have been supported as a creative thinker and leader by Peter Moffatt. In a process of “creative collaboration”, “we have to recognize a new paradigm: not great leaders alone, but great leaders who exist in a fertile relationship with a Great Group” (Bennis & Biederman, 1997, p.3). This is at the heart of how I envisage educational leadership.

In a collaborative process that included dialogue amongst Executive Council, Planning Council and Principals, Peter and I developed some personal characteristics and capacities that we feel capture the nature of the leader that we are looking to appoint in the Grand Erie District School Board. They are not intended as a checklist but a framework which might be helpful in the “Preparation for School Administrator Positions.” It began with an introduction:

People who are interested in becoming School Administrators in Grand Erie should seek (and be provided with) opportunities to demonstrate current knowledge, growth and skills in a variety of areas. These leadership skills are developed over time, through experiences. Creativity, enthusiasm, initiative, calculated risk-taking are important traits for School Administrators. Honesty, loyalty, dedication and paper qualifications for the position are assumed. A variety of different educational experiences is desirable to develop perspective (Delong & Moffatt, 2001b).

This introduction was followed by a number of skill areas that might be included in the development of a leader and which applicants to the role use to prepare for the position.¹ These are only lists without the stories that the applicants are asked to include in their applications. Only then do the capacities and skills and values come to life. Also in the process, the supervisor is asked to validate the accuracy of the stories. **As with the OCT standards, we wanted to avoid linguistic checklists (Delong & Whitehead, 1998).**

When I am interviewing prospective leaders or providing Professional Development sessions for aspiring leaders, I have a vision of the leader that I want leading the schools in my system. When I say that I envisage a leader who has the capacity to inspire others through strongly held and lived values of “honesty, fairness, caring, integrity, trustworthiness, and democracy”, I am seeing the faces of people like Greg and Cheryl² and Kim.³ A leader who has the ability to create and hold onto a vision for good, attract others to that vision and act to bring it to fruition brings up images of Maria (above) and James and Diane⁴. I support and encourage competencies like the capacity to think, reflect, plan, communicate, problem-solve and challenge “mental models” (Senge, 1990). I hold high expectations but give sustained support and work with and see the strengths of others. Educational leaders who have knowledge of learning and teaching and emphasize the relationships hold a long term commitment to creating a better social order (McNiff, 1992). Leaders, like Ruth Mills and Lynn Abbey⁵, have a *joie de vivre*, a life-affirming energy (Bataille, 1962; Whitehead, 1999) that is visible and inspirational and a passionate commitment to improvement and career-long professional growth. Their power lies in their capacity to influence, not in their position or position-power. They are collaborative, engaging and productive. They make my task as superintendent a real pleasure and personally and professionally fulfilling.

¹ See Staff Development Model: pp. 453-460 of the Appendices.

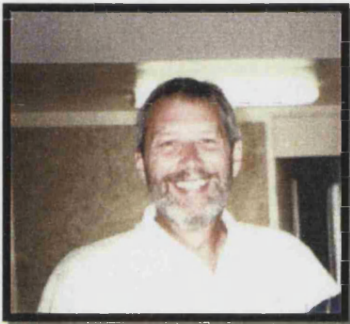
² See Chapter 2A.

³ See Chapter 2B.

⁴ See Chapter 3A.

⁵ See Chapter 3B.

The leadership programs that I help to design always include ‘building relationships’, ‘planning’ and ‘program’ as topics of sessions. Building relationships starts with knowing oneself and then getting to know others (Not surprising that Greg Buckles and Don Backus were the leaders of the program module). I value that I-You (Buber,



Don Backus, elementary & secondary principal, Covey trainer and leader of the School Leadership Program. I have known Don since January, 1989. He retired in June, 2001.

1923) relationship. **Note the connection to the title of the 2001 OERC Conference - Improving Student Learning: How Do I-You Know?**¹² I always look for candidates with the strongly-held values, self-knowledge and potential to learn and develop because it is easier to teach skills than values. Diana Lam (1990) then superintendent of Chelsea, Massachusetts schools wrote, “Yes, we need leaders with skills – but skills can be learned. I do not know how to change someone’s heart” (p. 1 in Sergiovanni, 1992, p.1).

These multiple roles that make up the whole of leadership constitute some of the complexities inherent in attempting to create The Knowledge Base in Educational Administration: Multiple Perspectives (Donmoyer, Imber & Scheurich, 1995). I am in agreement with James Scheurich and many of the other authors of the text that the seven categories that the University College of Educational Administration has determined to constitute the knowledge base are based on positivist thinking (p.21). In the Donmoyer et al. text (1995), Joseph Murphy refers to Jack A. Cuthbertson's (1988) historical description of the quest to describe and prescribe the work of administrators in educational settings:

After a century's pursuit of knowledge, scholars of educational administration still look to science, with its multi-faceted and changing definitions for a legitimizing cloak, facilitator of inquiry, and a tool to

¹² See chapter 3B.

be used in the continuing quest for knowledge about the ends, means, and settings of a very complex social process (24) (p. 49).

The real value of this particular text is that it presents “an intellectual vaudeville” (p. 6), alternative and challenging perspectives on the arena of educational administration and what constitutes the ‘knowledge’. Like Scheurich, I think there is no definitive knowledge base but that multiple perspectives are the most realistic means to capture the meanings. Donmoyer shares his experience in the field as an acting principal and finds that knowledge use in the field is characterized by serendipity (p. 94), that the “knowing what” knowledge base remains a black hole in most administrative preparation efforts and that “visceral literacy” is an essential skill (p. 87). He, too, questions the value of creating a knowledge base and after his practical experience finds himself “much more sympathetic to philosophers’ talk of ‘embodied knowledge’” (p. 91). Coinciding with the repeated concern in Division A sessions at AERA, 2000 and 2001 of the lack of application of academic theory in real life administrative practice, Anderson and Page (1995) support the greater recognition of practitioner research that focuses on the process of learning on the job:

Discussions should not be concerned so much with how we structure our programs or content for a knowledge base, but rather with how we choose the processes we use to engage with practitioners around the knowledge base that they already possess. Only by taking the narrativity of experience seriously can we produce dialogue and critical reflection in our programs, and model the process necessary to promote empowered practitioners and democratic institutions (p. 133).

In this same text, Shakeshaft (1995) is concerned with the androcentric nature, which she defines as “the practice of viewing the world and shaping reality through a male lens” (p. 140), of the current knowledge base in educational administration. She cites examples of distinctly different ways of perceiving administrative issues and

behaviour through the eyes of women and men including supervision, sexuality and language interpretation. Her earlier research (1987) indicated that:

1. *Relationships with others are more central to all actions for women than they are for male administrators.*
2. *Teaching and learning is more often the major focus for women than it is for male administrators*
3. *Building community is more often an essential part of the women administrator's style than it is for the man (Donmoyer et al., 1995, p. 146).*

In a similar vein, Bateson (1989), feels this multi-tasking, a dynamic of moving amongst the multiple intelligences, (Gardner, 1983) is a capacity which is very natural for women:

But what if we were to recognize the capacity for distraction, the divided will, as representing a higher wisdom.? Perhaps Kierkegaard was wrong when he said that 'purity is to will one thing'. Perhaps the issue is not a fixed knowledge of the good, the single focus that millenia of monotheism have made us idealize, but a kind of attention that is open, not focused on a single point. Instead of concentration on a transcendent ideal, sustained attention to diversity and interdependence may offer a different clarity of vision, one that is sensitive to ecological complexity, to the multiple rather than the singular. Perhaps we can discern in women honoring multiple commitments a new level of productivity and new possibilities of learning (p. 166).

I recognize that as I submit my original living educational theory (Whitehead, 1983, 1993, 1999) based on my understandings from the study of my practice that I will confront academics who do not value the practitioner-scholar view of educational

administration, despite the fact that “Dewey’s notion of educational science was one grounded in practice and the realities of schools” (Bredeson in Donmoyer et al., 1995, p. 50).

FITTING MYSELF INTO A LEADERSHIP MODEL

I find as I’m writing for the purpose of integrating the work of experts in the field, that I get furious at myself (I’m not blaming anyone else). I persist in trying to fit my practical embodied knowing into their typologies. Over and over I do this and wonder at the tension that builds up every time. I am learning to take the ideas of others only in so far as they help me to reflect on my life and to resist their application as a *means* of explanation (as Cheryl and I did with the OCT Standards of Practice). It seems amazing that the discourse of hegemony with its impositions and controls can consistently limit my capacity to describe and explain my life. I do, however, concede that I reflect on these writings and use or discard them as they work for me. At the same time that I am complaining about the limitations of writings by academics like Fullan (1982, 1993, 1999) and Fullan and Hargreaves (1991, 1996, 1997, 1998), I must recognize my responsibility to put my own work into the public domain for public accountability as they have done.

The theory around ‘transformation’ works for me whether in terms of teaching and learning or in leadership (Leithwood et al., 1999) but it cannot be a model (Day, Harris, Hadfield & Tolley, 2000; Stoll & Fink, 1996). I have engaged with the ideas of the researchers but not used them in a generalized or complete way. When I think back on myself as an aspiring leader, I looked for a way to turn my sense making into a general theory or a grand narrative. I wanted to fit my experiences into the theory being offered. I asked, *What is it? What is educational leadership?* Gradually I found I had faith in my creativity and a confidence in my embodied knowing as part of my growth of awareness as a superintendent. I gradually recognized that for me there is no definition. Through my descriptions and explanations of my life as a leader I give

meaning to my embodied knowledge on leadership. While I have read, used and integrated the traditional research, theory and writing on leadership, I have transformed that work through my own creativity so that the meanings are mine, based on my experience and research.

Writers/researchers that have influenced my thinking and doing include Peter Senge (1990, 1999), Seymour Sarason (1995), Andy Hargreaves and Michael Fullan (1991, 1996, 1997, 1998) and Gareth Morgan (1988, 1993). From Senge (1990, 1999) I used his work on “mental models, team learning and organizational learning.” The concept of “mental models” was helpful in learning to challenge my own and others' assumptions and forcing myself to take a new perspective. Team and organizational learning is an essential basic for an educational system where individuals must continue to learn but the system itself must learn and grow as well.

To aid in my growing capacity to understand how systems work, the work of Gareth Morgan (1988, 1993), was very helpful in making meaning out of systems and system behaviours. Morgan (1988) used a series of metaphors to explain some of the complexity of managing complex structures in turbulent times. He talked about managerial competencies such as: “developing an appropriate corporate culture; encouraging people to learn and be creative; and striking a balance between chaos and control” (p. 69). At the time of first reading these works, I was in my first system position, Coordinator of Special Education Services for The Brant County Board of Education. His analogy of “riding the waves of change” with a list of emerging managerial competencies (1988, p. 3) seemed interesting but vague at the time. When I could combine them with my daily experiences, these images such as spider plants and termite colonies began to make sense of the system processes. In addition, at the time, 1992, I heard Gareth Morgan (1993) at a conference on planning for improvement. Shortly after that I became a school principal and that concept of “making change in your 15%.” or “getting people to do a 1% improvement all over the place, [in order to] change the mindset” (p. 52) made planning with my staff more manageable.

Despite the fact that Peter Moffatt and I and other leaders in the system have been trained in Strategic Planning with its goals and objectives and strategies and action plans, we have never rigidly followed that model. Strategic plans tend to look and sound good but never really come to fruition because of lack of involvement and commitment by those implementing the plan. We have followed a vision of building 'capacity' (Stoll & Myers, 1998, p.7) so that each individual in the system would get better at planning in ways that made sense to them and to which they were committed. Annually and in three year cycles as a system we have set system areas of emphasis but each school, school community and individual must make their own commitment as to how they intend to make improvement.

I found the work of Seymour Sarason (1995) enabled me to conceptualize the power principle, the potential of inclusion of parents and community in improving schools and the barriers created by hierarchies. This connects to the arena of power relations that I have experienced with the academic world¹³ and have worked to reduce in my relations with staff and my children. When I consider the concept of 'insider' research (Anderson & Herr, 1999), I reflect back on Sarason's picture of professionals as insiders and parents (and other professionals) as outsiders. I agree with Sarason (1995) when he says that when you are going to be affected, directly or indirectly, by a decision, you should stand in "some relation to the decision-making process. What prevents us from operating according to that principle is the way we define the assets and deficits of people" (p.7). I can recall early in my tenure as superintendent responsible for the implementation of the new School Councils presenting to the administrators of the former Brant County Board. In the presentation I used some of Sarason's ideas and modeled an exercise that he included in his book. I asked them to visualize a parent coming up the steps of the school and to examine how they were reacting. It is an image that I use frequently in examining my responses to people outside of the education system. When I was just learning to be a principal, Peter Moffatt said that whenever a complaint came to him he took it as an opportunity to

¹³ See Chapter 5.

examine how we do things and to see if there are ways to improve. I've used that many times. We have shared with principals on several occasions that the most frequent complaint we get from parents is "I wasn't listened to." Sarason (1995) reminds me to be humble: "But if we indubitably have our imperfections--and no one has ever doubted that assertion--are we not obligated to be more humble, or at least more self-critical, about the rigidity of the boundaries we erect around our profession?" (p. 26).

Moreover, this hierarchical problem exists for teachers as much as parents and "teachers are the low person on the totem pole" (Sarason, 1995, 31). This attitude also applies to students. So when I treat a principal as an equal, potentially he/she sees the teacher as an equal, so then conceivably, the teacher replicates that approach with the student and students treat each other with dignity and respect. And thus a culture can be created based on true north principles (Covey, 1992) **I have seen it happen in Cheryl's classroom¹⁴ and in Greg and Kim's schools¹⁵**. What I have frequently articulated as an indicator of a good school is the school who sees parents and community (as well as children) as assets and resources to improve learning and I look for how many volunteers there are involved in the school. This directly connects to my standard of inquiry and reflection through non-hierarchical and democratic ways of relating and evaluation.

Even when I don't agree with a researcher/writer, I find that thinking through their work helps me to think through my own. Examining the nature of school culture and the changing systems within it (Fullan & Hargreaves, 1991; Fullan, 1993; 1999) articulated the problems and stimulated my thinking but never seemed to describe any solutions. As an example, contrary to their premise that change is a process, not an event, I think the implementation of the Conservative government's market force policies¹⁶ has been an event. There certainly was little process. They legislated a change and the educational system has been changed. Whether this is "educational change" is a valid point. (Hargreaves et al, 2001), I am in agreement with many of

¹⁴ See Chapter 2A.

¹⁵ See Chapter 2B.

¹⁶ See Chapter 1.

Fullan & Hargreaves' (1991) "guidelines for actions" (p. 63-107) such as recognizing the power of capacity-building strategies, frameworks of accountability, collaboration, and trusting in processes as opposed to employing distant hierarchical methods of compliance. However, just writing that schools are balkanized and need to be collaborative will not change the situation (p. 52-62). In my experience, where teachers, parents and administrators identify their own issues, research their practice and find their own solutions through creative engagement, real change can take place. While I agree that action research and research-based professionalism can lead to improvement: "Teacher research, especially action research, can be a particularly effective way to link improvement and inquiry to classroom practice (Kemmis and McTaggart, 1988, Oja and Smulyan, 1989). Professional researchers don't have a monopoly on research. Teachers can do it too." (p. 71), just talking about it won't do it. That *systematized knowledge* (Snow, 2001) exists: **it's not just teachers can; teachers are doing it.** (DeLong & Wideman, 1998a,b,c; DeLong, 2001b; Whitehead, <http://www.actionresearch.net>).

Another case in point is Fullan & Hargreaves' (1991) statement that you may trust in processes (p. 74). I think that you can trust in your individual capacity to creatively engage in risk-taking that is inherent in organizational problem-solving, to learn from mistakes but it must be in each case an individual response. I can manage a situation if I feel that I am operating according to my values and true north principles (Covey, 1992) Since September, 1999, I have worked with communities to conduct school 'accommodation' studies that have frequently ended in the reorganization and closing of small, community schools. In these processes I have come to realize that it is a very individual and personal experience for each person to try to comprehend the problem, arrive at a solution and work through what is frequently a grieving process in the end. I have found no easy route or pre-planning that can short-circuit what is both a logical and emotional response to a difficult situation: a situation created by a government forcing economic rationalist policies on small, rural and vulnerable communities. It is always for me an emotionally draining process with my only satisfaction in the hope

that I have tried to be sensitive to the emotions and allowed people the opportunities to vent and share their anger without taking it personally.¹⁷

I can learn both from research that I can apply and also from research that I don't find useful. The difference between my response to Sarason and Covey and to Fullan & Hargreaves is that I feel that Sarason and Covey invite me to an "appreciative engaged response" (D'Arcy, 1999) while Fullan & Hargreaves present in a traditional, propositional and conceptual way and send a message that a theory is out there that can explain my life. I agree with Stoll and Fink (2001),

Our experience in attempting to bring about change suggests that effective leadership is a key determinant in deciding whether anything positive happens in a school or a school system (Stoll And Fink, 1988, 1989, 1994). We have arrived at a place in our thinking, however, which suggests that traditional descriptions of leadership which tend to sort leaders into categories or typologies are inappropriate for the postmodern age and the challenges it brings to educational leaders (p. 101).

I believe that I must find my meanings in the context of their use. At issue is the validity of my process of ascending from the abstract to the concrete so that my embodied knowledge is viewed as a higher form of knowledge than the traditional propositional theorizing.

The cluster of leadership works on moral leadership (Sergiovanni, 1992), servant leadership (Greenleaf, 1977) sacred dimensions of leadership (Bennis & Nanus, 1985) caring and relational leadership (Gilligan, 1982; Noddings, 1984; Bateson, 1989; Regan & Brooks, 1995) and connecting work and soul (Bolman & Deal, 2001) provided me with a feminist and spiritual/religious/moral perspective on the arena.

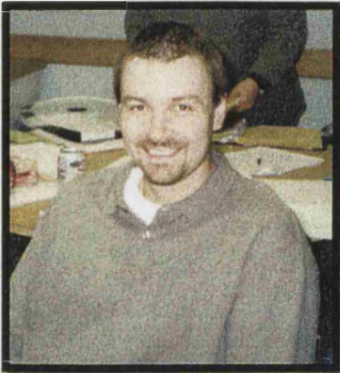
¹⁷ See Chapters 1 and 2B.

While all of these writers have to some degree transformed my thinking, doing and theorizing, their research helped me when I have been able to integrate their meanings into my own.

Sergiovanni's work (1992) was a particular inspiration at the same time as Covey in terms of "seeing a need for an expanded theoretical and operational foundation for leadership practice" and particularly referring to this expanded foundation as the "moral dimension in leadership" (p. xiii). Much of the dominant literature during the early years of my leadership experiences (1985-1990) was focused on "management values biased toward rationality, logic, objectivity, the importance of self-interest, explicitness, individuality and detachment" (p. xiii). I was looking for inspiration from an expanded view of leadership such as Covey, Sergiovanni and Bennis & Nanus described.

The concept of servant leader is clearly described in Robert Greenleaf's (1977) work. He says: "The servant leader is servant first... It begins with the natural feeling that one wants to serve, to serve first. Then the conscious choice brings one to aspire to lead" (p. 13). While his work has a religious message, I think his influence goes beyond that. He says that caring for one another is the foundation on which good society is built. That attention to the individual and taking time to care is reinforced by Sarason (1995): "And the reason most frequently given by physicians is precisely that given by teachers: 'I have no time.' It is a reason that concedes the point that recognizing and responding appropriately to individuality is a luxury, an unassailable value or goal that existing realities cannot meet" (p.157). **If goals are values (Blanchard & Bowles, 1998, p.41) and my values are my standards, despite my realities, I do not intend *responding appropriately to individuality* to be a *luxury* but a standard to which I am held accountable which the following narrative demonstrates.**

I think that I show care through empathy, listening for the concerns of others, supporting them and spending time with them. The significance of telling the narratives struck me when one of the masters students, Phillip Sallesky, a young man



Phillip Sallesky, core French teacher, Masters grad and PhD student. I have known Phillip for three years.

who is a very good teacher as well as a good student and who has great potential to be a school administrator, asked to talk with me privately. He talked about a situation where he was in conflict with a superintendent in another board and showed me e-mails where he had asked for a post-interview and been refused. He is a young man in a hurry and had been using an unproductive approach to problem-solving. I asked him if he still wanted a job in the other board. When he answered in the negative I asked him why he would continue the battle. He felt that he had been treated unjustly and was worried that his reputation would be damaged in discussions

among superintendents. I replied that under the right to privacy legislation, his application could not be discussed without his permission. When I assured him that his reputation was intact with me, that I cared about him and that he had a bright future in our board, he seemed to relax and concluded that it would be prudent to walk away from the conflict.

I was reminded once again of the importance of *spending time*. His face seemed brighter and his walk lighter when he left. The conversation had the same effect on me – I was tired and not feeling well but I felt good that he felt comfortable to share his concern, I had attended to his concern and had showed that I cared. As Cheryl affirmed, “Listening is caring. Sometimes (**and I forget this**) people only need to vent. They don’t need you to do anything, just listen. The fact that someone cares enough to listen and, the importance they place on that person’s opinion can make the listening the most important act. A reaction is not necessary many times. The difficulty is knowing which time is which” (Black, e-mail, 01/04/01).

My emphasis on building a community of interdependent learners (Covey, 1989) in my families of schools was influenced by Covey (1992), by Sergiovanni (1992), by Bennis & Nanus (1985) and by Bennis & Biederman, (1997). While none of these

provided prescriptions, they stimulated my thinking on how I could use their ideas to improve the schools, to be a leader of leaders (Sergiovanni, 1992) and to serve my staff. Bennis and Nanus (1985) agreed with Mr Wildman who in 1648 thought that, "Leadership hath been broken in pieces." However, in the leaders that they studied, they saw that the sacred nature of leadership and teamwork needed to be given priority. It seems obvious but not a widely held notion that "the more people you could put to work on a problem, the more opportunities you would have to find a solution" (p.121). That approach created what they called the "collegial organization" (p. 119) which was much like what Fullan & Hargreaves (1991) described as "collaborative cultures" (p. 59) but very unlike "forced collegiality" (p. 58). Blanchard and Bowles (2001) have used the parable of the hockey team to teach that "None of us is as smart as all of us" (p.60).

In addition to Sarason (1995) and Sergiovanni (1992), this theme is reflected in the work of Gilligan (1982), Noddings (1984), Belenky et al., (1986), and Bateson (1989). My experience has been that caring is essential but insufficient in providing leadership for improving schools. For Noddings (1984), empathy "does not involve projection but reception... I do not project. I receive the other into myself, and I see and feel with the other" (p. 30). I believe that caring and empathy must be combined with critical thinking and critical judgment. And as Sergiovanni (1992) concludes, "Good leadership is a necessary but insufficient condition for successful schooling" (p. 144).

THE INFLUENCE OF THE FEMINIST LITERATURE

I have persistently resisted categorization of my work as gender research or practice. I do, however, recognize that as a woman leader, my gender is a factor in how I operate and how I prioritize people and relationships (Bateson, 1989; Gilligan, 1982; Shakeshaft, 1995). It probably seems obvious to anyone who looks at the group of superintendents below to see that I am the only woman on the Brant and Grand Erie teams, with the exception of the Transition Team (1998) which included two women for a few months. People like Cheryl Black, Maria Birkett and Marion Kline tell me

that I am a role model as a female leader. I resist the gender bias because as a postmodernist I resist categorization. I don't want anyone to view my leadership as restricted by my gender but rather enhanced by it. I have worked hard to be a good leader



Executive Council Members, Brant and Grand Erie from 1994-2001: Colin Armstrong, Bill Leeson *, Gerry Kuckyt, Jim Grant*, Peter Moffatt, Ken Bell*, Jackie Delong, Dan Dunnigan, Wayne Thomas*. * - retired

not solely a female leader and many men that I work with value relationships to the same degree that I do.

I have come to appreciate the work of Gilligan (1986), Noddings (1984), Bateson, Belenky et al. (1986) and Regan and Brooks (1995). While I do not want to spend my time on the bifurcation caused by 'either-or' approaches to understanding myself and the world or by suggesting that the female way is better than the male way, I found myself nodding in agreement with many of the stories of the women in Women's Ways of Knowing (Belenky, et al., 1986). My growing confidence and capacity in becoming a leader has come about from listening to, valuing and integrating the voices of others as well as respecting my inner voice. I often speak of my connected way of doing things, of being able to see the relationships and connections amongst the various aspects of my personal life and complexity of roles in my job. "Connected knowing involves feeling, because it is rooted in relationship; but it also involves thought" (p.121). I could identify with "Women don't just learn in classrooms; they learn in relationships, by juggling life demands, by dealing with crises in families and communities" (p. xi). The authors describe five epistemological perspectives from

which women know and view the world: silence, received knowledge, subjective knowledge, procedural knowledge and constructed knowledge (p. 15). In my life I can see all of these ways of knowing and although not in any linear sequence, the trajectory of my development toward “constructed knowing” has become sharper in the years of my research on my practice. They describe “constructed knowing” as “learning to use the self as an instrument of understanding to arrive at passionate knowing” (Belenky, et al., 1986, p. 141).

When I first entered into leadership roles I followed a very male pattern of leadership where objectivity, logic and facts-based internal analysis were valued. “Prior to the 1980’s, women had to demonstrate to male superiors their ability to make tough decisions and be more efficient than male counterparts” (Stoll & Fink, 2001). In fact there were few female role models to emulate or talk to, which Regan & Brooks (1995) say is common in the studies they have conducted. I reluctantly refused to listen to my intuition and my experience which was considered soft data. In the past ten years through Howard Gardner’s (1983) work on multiple intelligences and Coleman’s (1997) and Stein and Book’s (2000) work on emotional intelligence, listening to gut feelings and hunches and inner voices has become more valued. Belenky et al. (1986) say: “This interior voice has become, for us, the hallmark of women’s emergent sense of self and sense of agency and control” (p. 68).

However, one of the real dangers here lies in any continuation of the dichotomy caused by thinking that one way of knowing and being is superior to another:

Reliance on authority for a single view of the truth is clearly maladaptive for meeting the requirements of a complex, rapidly changing pluralistic, egalitarian society and for meeting the requirements of educational institutions, which prepare students for such a world (Belenky et al., 1986, p. 43).

I agree as well with Bateson (1989) that we need to recognize “the dangers of devotion to the superiority of any group, gender, race, religion, or nation, or even to the truths of any era. The real challenge comes from the realization of multiple alternatives and the invention of new models” (p. 62).

It was a seminal event in my life when I recognized that the difference between the way my thinking and learning worked and Peter Moffatt's. I can't put a specific time on it but I do remember a conversation in his office early in my tenure as superintendent. I think we were discussing our profiles on the Myers-Briggs Inventory, a scale that measured our leadership styles. I remember saying to him that what was preventing me from being as effective as I might on Executive Council was that everyone was an introvert except me; I am an extrovert. I meant that all of the others processed information internally and individually and I processed information through thinking out loud and in dialogue. The others would come to the meetings with fully analyzed, fully completed reports and expect my support without any discussion. At first I associated that characteristic solely with my being extroverted but as I read Belenky et al. (1986), Tannen (1990) and Gilligan (1982) I began to see that it is also associated with my gender. Not only is the talk part of my learning, it is also part of my need for intimacy and relationship. Belenky (1986) makes a distinction between real talk and “didactic talk in which the speaker's intention is to hold forth rather than to share ideas”(p. 144). What constructivists call "real talk", Jurgen Habermas (1982), called a kind of ideal speech situation: "Speech that simultaneously taps and touches our inner and outer worlds within a community of others with whom we share deeply felt, largely inarticulate, but daily renewed inter-subjective reality (p. 620 in Belenky, 1986, p. 146). By my articulating my dialogic learning style, Peter has become more responsive to my needs.

Gilligan's (1982) work is significant to me in terms of understanding the emphasis I place on relationships with people. I wouldn't say that the relationship is of sole importance but it is essential to me to give meaning and purpose to my life and work. Because I find it extremely hard to work with someone who is very negative or totally

pragmatic, I gravitate to people who have a passion for life and a will and commitment to make things better. When I combine care for the other and responsibility to improve things I find real satisfaction in an endeavour. Gilligan traced the development of a morality which combined care and responsibility which she saw as dominated by women as opposed to a morality of rights more commonly practised by men (pp. 160, 163-164).

But approached from different perspectives, this dilemma generates the recognition of opposite truths. These different perspectives are reflected in two different moral ideologies, since separation is justified by an ethic of rights while attachment is supported by an ethic of care (p. 164).

She says that women perceive and construe social reality differently from men and that these differences center around experiences of attachment and separation (p. 171). She goes on to say that there is a need for research on adult development that delineates “in women's own terms” the experience of adult life.

...The concept of identity expands to include the experience of interconnection. The moral domain is similarly enlarged by the inclusion of responsibility and care in relationships. And the underlying Greek ideal of knowledge as correspondence between mind and form to the Biblical conception of knowing as a process of human relationship (p. 173).

In the development of my career, I see myself reflected in Gilligan's (1982) thoughts on mid-life development (p. 171). As my children matured, I grew more independent and focused more on career achievement at a time when most men had reached their goals. Question-posing which Gilligan (1982) says is at the heart of the responsibility orientation is fundamental to my connections with people. The questioning is part of a moral imperative to improve the educational system for the teachers and children in it.

One of the strategies I have used frequently to develop my skills of listening in “conversing in the connected mode” (Belenky, 1986, p. 114) is a combination of forbearance, patience and “intentional passivity” (VonWright, pp131-32 in Belenky, p. 117). According to Noddings (1984):

I let the object act upon me, seize me, direct my fleeting thoughts...My decision to do this is mine, it requires an effort in preparation, but it also requires a letting go of my attempts to control. This sort of passivity...is not mindless, vegetablelike passivity. It is a controlled state that abstains from controlling the situation (p. 165).

An example of that attention to the other, of empathetic listening (Covey, 1989), of a deliberate willing passivity can be seen in my role in the Secondary Teachers Action Research (STAR) meeting of May 8, 2000. This network was started by Dave Abbey and continues to be supported by him and Lynn Abbey. I remember asking him if he wanted me to attend the first meeting of the group and he said he thought it would go better without my presence because of my position. That was very astute of him and I respected his honesty. I was, however, invited to the May, 2000 meeting and was very conscious of being in the background. That capacity has come about as a result of a concern expressed in my evaluation done by the principals and vice-principal in the PJ family of schools in June of 1995, of my increased awareness of the power of my position and of my improvement in the interim.¹⁸ “Patience,” says the writer Simone de Beauvoir (1976), “is one of those ‘feminine’ qualities which have their origin in our oppressions but should be preserved after our liberation” (Belenky, 1986, p. 153).

The imagery of living life as improvisation resonates with me. Mary Catherine Bateson's book, Composing a Life (1989) connected with Richard Winter's (1998) definition of action research as improvisatory self-realization (p.371). Bateson (1989) starts the book with, “This is a study of five artists engaged in that act of creation that engages us all--the composition of our lives. Each of us has worked by improvisation,

¹⁸ See Chapter 2B.

discovering the shape of our creation along the way, rather than pursuing a vision already defined” (p. 1). What I particularly liked about this book was that it was a collaborative effort of the five women involved and although the dominant voice is that of Bateson, she talks about her wish to give equal value to all their voices and about her struggle to accomplish that intention. That intention reflects back on the collaborative work of Cheryl Black and I.¹⁹ There are many books studying women's lives (Belenky et al, 1986; Dadds, 1995; Marshall, 1995; Regan & Brooks, 1995) but few like my own that is my own study of my life. I found the stories in Composing A Life (Bateson, 1989) reflected my own life with “their pathways into zigzags or, at best, spirals” (p. 233). One of the attributes that has increased my capacity to be flexible, resilient and to deal with ambiguity is just the sorts of experiences that I share with the women in the book. I think I have lived as if “composing a life involves an openness to possibilities and the capacity to put them together in a way that is structurally sound” (p. 63). In my work I ask as Bateson did, “But what if we were to recognize the capacity for distraction, the divided will, as representing a higher wisdom?” (p. 166). And “Instead of concentration on a transcendent ideal, sustained attention to diversity and interdependence may offer a different clarity of vision, one that is sensitive to ecological complexity, to the multiple rather than the singular” (p. 166). Like Bateson and her friends, “[I] work too hard, burning too many candles, driven by a sense of how much needs to be done”(p. 237).

In Out of Women's Experience: Creating Relational Leadership, (1995), Regan & Brooks base their view of relational leadership on a way of re-framing a patriarchal society which they view as a “broken pyramid” (McIntoch, 1983 in Regan & Brooks, 1995, p.13), through “relational knowing” (Hollingsworth , 1992a in Regan & Brooks, 1995, p.79-80) to form a metaphor of a double helix to symbolize the concept of relational administering (p.19-22). “Hollingsworth (1992a) located relational knowing at the intersection of three bodies of knowledge: theories of social construction of knowledge, theories of feminist epistemologies, and theories of self/other relationships” (p. 79). In their conclusion, Regan & Brooks (1995) say:

¹⁹ See Chapter 2A.

Although we know that relational leaders exist (we think of ourselves as such), to our knowledge, no one, including ourselves, has examined leadership through this lens. That is a project for the future, which will require the efforts of scholars familiar with the classical and emerging literature on leadership, as well as reflective practitioners of both genders who have consciously integrated masculinist and feminist attributes of leadership in practice (p. 93).

My study contributes to an increased understanding of a relational way of leading. To effect improvement and change, I find that caring and empathy needs to be combined with critical and creative thinking and critical judgment.

WORKING TO REDUCE HIERARCHIES

My need to reduce hierarchies may bear some relationship to the high regard I have for the work of educators and what Martin Buber (1947) says about humility and the values contained in the glance:

If this educator should ever believe that for the sake of education he has to practise selection and arrangement, then he will be guided by another criterion than that of inclination, however legitimate this may be in its own sphere; he will be guided by the recognition of values which is in his glance as an educator. But even then his selection remains suspended, under constant correction by the special humility of the educator for whom the life and particular being of all his pupils is the decisive factor to which his "hierarchical" recognition is subordinated. For in the manifold variety of the children the variety of creation is placed before him (p. 122).

I think I can provide some evidence of this value in my relationships from an observation of Fran Squire, Project Manager at the Ontario College of Teachers:

What is remarkable about you as a superintendent is the non-hierarchical nature of your relationships with your staff and your commitment to relationships. This is evidenced in the time you commit. Other superintendents 'drop in' to sessions like this while you stay and participate. When I asked her if she felt any tension or reluctance in the focus group because I was there, she said she saw none and in fact felt the very opposite in that they felt comfortable to articulate their beliefs and reservations. For example Pat the kindergarten teacher talked about her unease in the first session which was caused by her concern about how the standards of practice would be applied (transcript of OCT standards workshop, 1999).*

After the focus group, Janet Rubas, program consultant, commented about how good it felt to hear a superintendent in her board articulate a philosophy of moral leadership, a philosophy focused on caring and respect for people, both children and adults.

LIVING LIFE AS JOB TRAINING

I was interested to listen to the work of Irene Karpiak (2002) on autobiography and adult learning at AERA 2002 in New Orleans. She talked about adult learning as being transformative in that:

It is learning that permits a more inclusive, differentiated, and integrated view of themselves and the world (Mezirow, 1991; Tennant & Pogson, 1995). Central to transformative learning is critical self-reflection, whereby adults engage in a process of examining the cultural and personal assumptions and meanings that underlie and shape their view of life (Mezirow, 1991; Brookfield, 1987). Whereas

critical reflection calls largely upon the learner's rational processes (Mezirow, 1991), it also includes intuitive and emotional dimensions.

Here is a story that I think reflects rational and emotional processes of reflection and learning. During 1998-2001, I was responsible for the organization and process of holding public meetings studying possible school closures and reorganization in my family of schools. On November 24, 1998, I stood in front of the group of three hundred angry community members in the Valley Heights Secondary School auditorium prepared with my slide show full of data covering the facts and graphs of the situation.²⁰ I was feeling the animosity in the room and knowing, as much as anyone can fully know, that this would not be a pleasant evening. The committee members sat at the front in a row looking uncomfortable as well. When the chairman, a trustee from the area, explained the process and asked me to review the current situation, people in the audience were speaking out and each time that I attempted to go through the slides projected from the computer, they would interrupt with questions and comments. I attempted to continue but on several occasions I deferred to the chairman for direction. With quiet determination and a slow and steady delivery, I reviewed the slides. Later, in the same professional and calm manner, I attempted to answer the questions directed to me.

I felt attacked but worked very hard not to show my anger or discomfort. When I was asked how I maintained the professional calm demeanour, I answered that I just kept a tape running in my head that said:

1. *This is not a personal attack*
2. *There is no reason that they should be happy about this*
3. *Your parents taught you to treat everyone with respect.*

Where did this capacity come from? It comes from growing up in a family where values of respect and dignity of the other were lived. It seems to me that it may be

²⁰ See Chapter 2B.

partly at least from twenty-three years of living with and dealing with aggression. Over that time (1970-1992) I learned coping mechanisms to deal with aggression from my husband: pacify, circumvent, avoid and ignore. With a vision of my children's safety and wellbeing in mind, I steeled myself to the aggression and visualized where it might come out.

With the Valley Heights Accommodation and Consolidation Study, I looked to solving the financial problems and the program needs as the long-term vision recognizing that the study process would not win any friends. I had a sense of not locking into the anger, of being the consummate professional and of rising above the fray and protecting the values that I stood for. Maybe I have my ex-husband to thank for my capacity to withstand the barrage of aggressive behaviour. I wonder if I had had only pleasant experiences if I would have this capacity. In any case, life experiences better equipped me to deal with the aggression of these public meetings. Carol Gilligan (1982) describes this as the maturity of experience. This may be part of my preparation for leadership but I don't recommend the means!

COMBINING THE PERSONAL AND THE PROFESSIONAL

I was cautioned at one of the Validation Group Meetings (2000) by one of the members about including my personal and family life. This opinion was not held by the entire group and is not held by Michael Erben (1998):

Biographical investigation must involve the continual examination of the interplay of family, primary group, community and socio-economic forces. To explore one without the others is to impoverish interpretation.

As such, while the researcher must contextualize lives within economic conditions, they must also seek to comprehend their specificity (p. 9).

I have shared my relationship with friends, Diane Morgan, Cheryl Black and Peter Moffatt. I think it is also necessary to understand the context of the narrative of the professional educator where I am living that *divided will* and *multiple commitments* (Bateson, 1990, p166) fulfilling multi-roles, one of which is mother.

Stephen Covey (1992) says that there are four human needs: to live, to love, to learn, to leave a legacy. I think the most significant legacy that I leave is my children. I make no claims about being the perfect mother but I do feel pride in the strong young people that they are and I feel I can take some credit. Children learn more from who you are and what you do than from what you say. They have seen a committed, hard-working person who cares for them and others and who gives them unconditional love. I taught secondary school students for six and a half years before they were born. As a stay-at-home Mom with pre-schoolers, I centred my life around them and worked at being a homemaker with the same intensity and commitment that I give to all that I do. Shannon wrote,

My earliest memories are of my mom staying home with me and my older brother Dean. To sum them up, she could have given Martha Stewart a run for her money in everything from homemade strawberry-rhubarb jam (grown in the backyard) to the little dresses that she sewed to put clothing on my back...

So, even when she wasn't "working", she was. She wasn't a "teacher" but she was a "mother" and to her, that meant doing her best at the job at hand, especially when it came to her children. And anyone who has worked with my mother knows that her best is nothing short of perfection.

Perhaps that is why I had difficulty when my mother went back to work, first only part-time, then full time when my brother and I were in school. It's hard to admit now how I resented it. I'd had too much of a

good thing and I put up a fight to keep it. But it wasn't many years before I saw, what took me longer to fully understand, was that working is important to my mom. And more than that, that what she does doesn't just matter to her, but is a big part of who she is and how she defines herself (Foerter, August, 1999).

As I entered back into the workforce, Dean was going to school full time and I started back half-time as Shannon was in half-day kindergarten. I struggled for two years to get back to a teaching position with a permanent contract and some tenure. Juggling husband, children and a job was demanding but I was happy to be back at work. As they grew older I started doing volunteer work for the teacher union and later was elected to a salaried position (District President). I moved into increasingly responsible positions with the board from Department Head to Coordinator of Special Education Services to Principal.

Shortly after my appointment to my second principalship, my marriage fell apart. Both of the children went through a difficult time when my marriage dissolved, a marriage that I was trying to hold together for them. You do what you think is best at the time and afterthought is always right.

My parents separated when I was sixteen. While it wasn't a surprise, and we could all see that it was for the best, it was tough. They had put a lot of years into the marriage thinking that stability meant two parents in the same house when their kids thought they should find some way to be happy apart. While this is one difficult issue we had, at least by sticking to their decision, my brother and I were both old enough to understand what was happening and to be an active part in that. I think waiting helped us see that is was the right course of action and that blame is irrelevant...But watching my mom struggle through gracefully taught me a lot (Foerter, August, 1999).

Dean was at University and Shannon was home with me. I don't know who had the harder time. Shannon lived in the middle of it and Dean heard about it second hand. Shannon and I grew very close over the adjustment years of 1993-1995. I was trying to move on to a new cycle of my life. It came in the form of a new job-a superintendency for the Brant County Board of Education. Shannon started University and I poured myself into the new role.

Now they are both graduates. Dean is married and working as an account supervisor in a Canadian advertising company in Toronto; Shannon is a staffing consultant in a career placement firm in Mississauga. They are intelligent, hard-working and caring individuals and when I look at their wedding and graduation photos, I feel proud of my legacy (Covey, 1992).

SENDING THAT MESSAGE OF FAITH IN THE OTHER

A recurring theme in my relationships with people is my capacity to see their potential and to relay it to them where they had not seen it before. There is evidence in my daughter, Shannon, who was explaining to her new boss where her confidence came from, "Mom always sent us (Dean and Shannon) the message that there was nothing that we couldn't do" (conversation, July 29, 2001). This theme runs through the stories of Kim Cottingham²¹, Cheryl Black²² and Marion Kline (see below), keeping in mind that

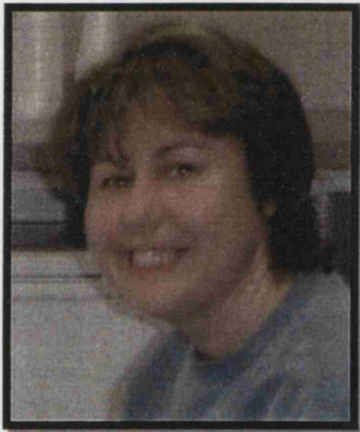
Between interpretations of a stimulus and response, individuals have a conscious choice of how to behave, based on their knowledge and perceptions. To say, therefore, that one person can motivate another is to deny free will. A leader can create a context in which a person is inclined to act in preferred ways, but – from the perceptual point of view – cannot motivate someone, any more than one can oblige love or any other human emotion (Stoll & Fink, 2001, p. 108).

²¹ See Chapter 2B.

I know that the following is a very long e-mail but I feel that it captures my valuing the other standard of practice and judgment which is revealed in dialogical and dialectical ways. Here are Marion Kline's (e-mail May 29, 2001) views on my way of being a superintendent who values her:

Dear Jackie.

I had my interview for the teacher consultant position. I arrived about a half an hour early and had on the new suit I had bought for the interview. I felt good about how I looked because I wanted to give a



Marion Kline, classroom teacher, now teacher consultant, one of the masters grads. I have known Marion for three years.

first impression of being very professional. I had practiced quite a bit for the interview in front of my bedroom mirror and made a mental chart in my mind of the areas that I suspected they would ask about. However, a funny thing or maybe a twist of fate happened when I arrived. It seems that the interview team was running slightly behind and so Greg Anderson came out and introduced himself and then took me to the staff room to wait so that I could be more comfortable during the wait. I

helped myself to half a cup of coffee and read a little of the newspaper. I think that instead of being nervous during that time, it worked in just the reverse way. When they came to get me I felt relaxed and confident. A year and a half ago I entered this Master of Education program as a person with low self esteem and low self-confidence. When I complete this program one of the most important things that I have gained is the confidence to believe in myself.

²² See Chapter 2A.

During the first course I rarely spoke and was greatly impressed by the knowledge and confidence of some of the others. As I began to research my question, video tape myself and read I began to understand the value of my lived experiences in the classroom. At times waves of self-doubt would come back to me as voices of my past impressed on me my imperfections and inadequacies. There were times when I picked up the phone and called you.

You always had time for me. We talked on the phone so comfortably and openly that I believe those conversations kept me in this program. Everyone should have a someone to talk to like you. You are such a good listener and sincerely cared about me. You gave me advice with dignity. If we were really talking right now you would say, Marion how do you know? What did I do that made you feel that way? I know you sincerely cared because of many little things you did. During one phone call you immediately said, "When can we meet?" The reaction was so genuine and you so honestly wanted to help me that I will never ever forget the tone of your voice and the speed of your reply.

The another time that I recall right now was when I told Cheryl that I had called you and had such a great conversation with you. I was telling Cheryl how much I feel inspired and ready to write after talking to you. Cheryl told me that you valued our conversations as well. That really made me feel good. You are a little like a lighthouse for me. You keep me focused on where I am going. You have always supported me but at the same time let me find my direction on my own.

So back to the interview. When I went in I had conversation with the interview team. My answers conveyed the person I am, who really, really believes that I can improve student learning by supporting other

teachers with dignity the way you have supported me. My rehearsed answers did not come out as stiff or prepared but blended into natural confident and articulate statements about my beliefs and abilities.

One experience that significantly changed me was the conference we went to in December at OISE. Sitting on the panel and articulating my research question to others was a huge leap. The reaction of those in attendance was very significant. That experience really validated my belief in me. One participant at the conference came up to me and asked if I was doing a workshop because she liked what I had to say and wanted to find out more. I also was approached in the elevator by another participant who appreciated and valued what I had said.

When the interview came to an end Greg Anderson ask me if there was anything I wanted to share that I felt had not come out in the interview. I smiled and said " You may not know this yet, but I am the right person for this job. I can support teachers with dignity to improve student learning in Grand Erie." When I finished Greg Anderson commented something about me having made quite an impression and created a feeling within the room. When I left I felt really good. I had done the best job that I could do. I had no regrets. The genuine Marion had shone through. I was so proud of myself. Marion.

I think my way of sending that message of faith in the other and valuing the other shows some connections to what Stoll and Fink (2001) call *invitational leadership*:

Leadership is about communicating invitational messages to individuals and groups with whom leaders interact in order to build and act on a shared and evolving vision of enhanced educational experiences for pupils. Invitational leadership is

based on four premises: optimism, respect, trust and a purposefully invitational stance... Their actions are intentionally supportive, caring and encouraging (p. 109).

Once again I think that I-You relationship is involved here as “he will be guided by the recognition of values which is in his glance as an educator” (Buber, 1947, p. 122). The success of the people that I coach and mentor is also my legacy (Covey, 1992).

WHY IS THERE NO SIMPLE (OR EVEN COMPLEX) ANSWER TO THE QUESTION ‘WHAT IS EDUCATIONAL LEADERSHIP?’

On March 14, 2001, I attended a lecture arranged by Louise Stoll at the University of Bath by Dr. Alma Harris, one of the authors of Leading Schools in Times of Change (Day, Harris, Hadfield, & Tolley, 2000). The lecture was interesting and informative in terms of recent research. Using twelve case study schools the authors researched the fit between theoretical models, transactional, transformational, pedagogic/instructional, moral and emotional, and current practice. Alma’s conclusion was that there is no single model for leadership and that it is a very values driven and emotive experience. Having said that there was no single theory that could explain leadership and recognizing the irony in it, she then went on to describe her theory as a result of the research: Post-Transformational Theory! She outlined the characteristics of effective leaders:

- *High expectations of self and others*
- *Tangible, communicated sense of professionalism*
- *Central focus on care and achievement of pupils*
- *Ability to create and maintain learning culture for staff and students*
- *Toughness of vision, clarity of values*
- *Created, maintained and monitored relationships*

- *Entrepreneurial, risk takers, net workers*
- *Made tough decisions*
- *Acknowledged failure but learned from it*
- *Possessed Leadership repertoire*
- *Recognized and managed ongoing tensions and dilemmas in a principled way*

She also articulated the tensions they face such as “Leadership versus Management” and “Personal Values versus Institutional Imperative” but made no connection between the two. She recognized in the discussion that there was nothing in the characteristics that dealt with coping with the tensions and moving forward, no connections between values, the process of connecting with your values and living those values even though it was all about living those values. Sounds like the dilemma of defining leadership!

Stoll & Fink (2001) support this transformational leadership model with reservations:

While these conceptions of leadership are the subjects of research and journal articles, reality in schools is significantly different. Southworth (1994), observing leadership in British primary schools, concluded: ‘While these categories help us to classify heads as transactional or transformational, they do not capture the character and nature of leadership in action. They are too abstract and omit the vigorous quality of headteachers at work’ (p. 18) (p. 106).

It would appear that no single leadership model adequately describes the expectations and reality for contemporary educational leaders (p. 107).

With regard to the order of things, I am beginning to recognize as a pattern in my research and thinking the congruency in my epistemology, my ontology and my methodology. I recognize it as a pattern in my work that is different from others. I start

with describing and explaining my experience in my writing and thinking and then move to the theorizing about it. I believe that this is what is different about the epistemology of practitioner scholars and the way in which Donald Schön (1995) felt that Boyer's (1990) new forms of scholarship would challenge epistemological, institutional and political issues in the university (p. 27). Traditional academics start with theory and then apply it to their own or someone else's practice. Another's thoughts and theory cannot explain my life. And I have found myself attempting to do just that.

In practice I find that I begin my thinking and writing with a narrative of *real, lived, insider* experiences, events in my practice. That narrative is not simply a list of a sequence of events. It also incorporates my reflective thinking on the experience, in and on the writing of the narrative, during and after the conversations that I have had at all of these stages in the refinement of the understanding of the learning and improvement. And they are different reflections out of which arise new learnings. What is problematic is that closure is elusive. Learning to improve oneself is very messy, is never concluded and refuses to be tied neatly in a bundle for final offering. That is not to say that the product, even if not perfect, is not important. I do not want to find myself in the sorry predicament of the editors, Grant and Graue (1999), of the Review of Educational Research when they realized that they had failed to attain their purposes as editors. Nor do I wish to end my career with the palpable sadness and regret of David Clark (1997).

And now for my answer to the meaning of educational leadership. I feel that I am showing how I hold together those tensions and contribute to moving the system ahead over time. My theory is that in order to be an effective leader, I need to research my practice to form my own living theory of education (Whitehead, 2000). The only 'model' that I know that works is to recommend that each person develop his/her own living educational theory to discover the values that are their standards by which to live and be accountable. I am 'modelling' this approach to leadership in my system. Two of the masters graduates have followed this path and are continuing the process

of refinement of those *living standards* as am I. (Black, 2001; Knill-Griesser, 2001). I know that having researched my practice I am more able to articulate my values as the standards of practice and judgment for which I wish to be held accountable and that I know my school system in a depth that I didn't before the research. I hope that I am "learning to use the self as an instrument of understanding to arrive at passionate knowing" (Belenkey et al, 1986, p. 141). I know that it is a great time to be a leader and I am excited about the challenge.

I conclude this chapter on leadership with George Bataille's (1962) words:

It is not necessary to answer the riddle of existence; it is not even necessary to ask it.

But the fact that a man [woman] may possibly neither answer it nor even ask it does not eliminate that riddle.

If I were asked what we are, I should answer: 'We are the door to everything that can be, we are the expectation that no material response can satisfy, no trick with words deceive. We seek the heights. Each one of us can ignore this search if he [she] has a mind to, but mankind as a whole aspires to these heights; they are the only definition of his [her] nature, his [her] only justification and significance' (p. 274 -275).

In the final chapter I share the method that I have used to research my practice.

Chapter Five

THE METHODOLOGY OF MEANING MAKING

In this chapter on my methodology of meaning making, I share the way in which I have made meaning out of the data archive that I have collected, analyzed and validated over six years as a superintendent. In my dialectical and dialogical way, I ask and answer the questions: Why did I choose the action research process? What approaches did I use to conduct my research? and How have I validated my claims to know? I explain how my mode of inquiry has been influenced by a living educational theory approach to action research (Whitehead, 1989, 1993, 1999). By this I mean that the story of my research is a first person inquiry into my own learning and knowledge-creation between 1996-2002 in a Ph.D. program as I ask, research and answer the question, “How can I improve my practice?”

My theorizing emerges naturally from the narratives of my life as a superintendent in a self-critical process of judging my work in terms of its coherence within my values as standards of practice and judgment and from public accountability by sharing my stories. The assessments and evaluations of friends and family, professional colleagues and practitioner and academic researchers have informed my practice and theory.

WHY DID I CHOOSE THIS ACTION RESEARCH PROCESS?

Choosing action research as my process of choice, according to Kushner (2000), may stem from my values, my socialization, my problem, my experience or as Stake (1995) says, a search ‘for understanding the complex interrelationships among all that exists.’

A distinction between what knowledge to shoot for fundamentally separates quantitative and qualitative enquiry. Perhaps surprisingly, the distinction is not directly related to the difference between

quantitative and qualitative data, but a difference in searching for causes versus searching for happenings. Quantitative researchers have pressed for explanation and control; qualitative researchers have pressed for understanding the complex interrelationships among all that exists (Stake, 1995:37 in Kushner, 2000).

The action research process with 'I' at the centre answering questions of the kind "How do I improve my practice?" resonated with me because of the nature of the question that the living theory approach addresses. I had been looking for ten years, subsequent to the completion of my masters degree, for a research process that was qualitative, rigorous, and practical in the sense of helping me to improve my work in helping teachers and school administrators to improve the learning of students. In my masters program I had studied research methods which were mostly quantitative, objective and grounded in social science and knew that that was not a route I wanted to follow. I was concerned with the inability of propositional forms to explain my life because they appear to deny the experiential meanings in my practice. I wanted a method that allowed for my creativity to ask my own questions and integrate my own insights.

The reading I had done on leadership was mostly theoretical and 'about' leadership. It was during the first year of the action research project with the Group of Seven¹ that I heard Jack Whitehead speak at the first Act Reflect Revise Forum in Toronto, and with his help put the pieces together that I might conduct the kind of research that I was supporting the teachers to do.

I knew intuitively that I was not looking to follow a pre-defined method that would confine my creativity. Other graduate students I knew talked of finding a model or framework for their research. I felt that this living educational theory of action research would allow me the "methodological inventiveness" (Dadds & Hart, 2001, p. 166) that I would need to theorize about my life and work. I knew that I could not

¹ See Chapter 3B.

simply choose a method but that as I conducted the research I would continue to question the appropriateness of the approach in a methodology that fit my purposes. I think you will find that my process of research has been emergent. It has supported the development of my epistemology and is inherent in my ontology, particularly in my postmodern resistance to rules and structure.

We have understood for years that substantive choice was fundamental to the motivation and effectiveness of practitioner research (Dadds, 1995); that what practitioners chose to research was important to their sense of engagement and purpose. But we had understood far less well how practitioners chose to research, and their sense of control over this, could be equally important to their motivation, their sense of identity within the research and their research outcomes.

We now realise that, for some practitioners, methodological choice could be a fundamentally important aspect of the quality of their research and, by implication, the quality of the outcomes. Without the freedom to innovate beyond the range of models provided by traditional social science research or action research, the practitioners in our group may have been less effective than they ultimately were in serving the growth of professional thought, subsequent professional actions or the resolution of professional conflicts through their research. In this, we find ourselves sympathetic to Elliott's claim (1990:5) that 'One of the biggest constraints on one's development as a researcher, is the presumption that there is a right method or set of techniques for doing educational research' (Dadds & Hart, 2001, p. 166).

Action research has the potential of creating important new knowledge about teaching and learning. I like Michael Bassey's (1995) book, Creating Education through Research and what he says about research contributing to public knowledge:

In research in educational settings a claim to knowledge is likely to be about some theoretical aspect of teaching and learning, or about educational policy, or about teaching or managerial practice. It may, for example:

- *contribute incrementally to the accumulated knowledge of the topic under study;*
- *challenge existing theoretical ideas;*
- *offer significant improvements to existing practice;*
- *give new insights into policy;*
- *introduce a new methodology of potential power;*
- *provide a 'significant piece in a jigsaw of understanding'; or*
- *bring together disparate findings and integrate them into a new theoretical structure (p.71).*

The action research process with “I” at the center developing one’s own living educational theory (Whitehead, 1989; McNiff, 1992; McNiff, Lomax & Whitehead, 1996) fulfills all of Michael Bassey’s criteria for contributing to public knowledge.

I see the creation and testing of educational theory as a fundamental purpose of educational research. The BERA booklet on Good Practice in Educational Research Writing (2000), incorporated the development of educational theory in its two main thrusts:

There are two main thrusts to educational research, viz.:

- (a) *to inform understandings of educational issues, drawing on and developing educational theory, and in some cases theory from related disciplines (e.g. sociology, psychology, philosophy, economics, history, etc);*
- and*

- (b) *to improve educational policy and practice, by informing pedagogic curricular and other educational judgements and decisions. Much research includes both of these purposes, some contributes mainly to one (p. 85).*

I recognize that my understanding of educational theory does differ from many educational theorists. The difference is focused on what counts as a demonstration of originality of mind and critical judgement in a substantial contribution to knowledge. It is focused on the nature of the standards of practice and judgment which can be used to test the validity of a claim to educational knowledge. In response to “tradition-constituted and tradition-constitutive enquiry”, MacIntyre (1990) says,

The rival claims to truth of contending traditions of enquiry depend for their vindication upon the adequacy and the explanatory power of the histories which the resources of each of those traditions in conflict enable their adherents to write (p. 403).

I identify with Phillip Sallesky (2000)³, a Brock University-GEDSB Masters student taught by both Jack Whitehead and myself, when he articulates very clearly his reasons for choosing action research:

My reasons for the choice of this approach is that it is the only methodology which embraces the inclusion of the 'T' of the practitioner-researcher as a legitimate focus for research. Action research accepts the notion that the researcher does not need to be external to the study in order for the information and results found to be valid. This is a major shift in thinking and presents a unique opportunity for the researcher since the motivation for researching comes from within, i.e. the researcher's desire to improve his/her practice (Whitehead, 1989).

³ See Chapters 3B and 4.

This approach also represents the sequence that I know I work at to improve my practice. Firstly, I analyze my practice and find an area that needs improvement. Secondly, I try to imagine ways and set up a plan in which to bring about this improvement. Thirdly, I act on this plan and collect data on the effectiveness of my plan in terms of my practice and lastly, modify my plan with regard to my goals and the data previously collected.

While my plan is progressing I consult with peers from my Master's course, my professional context and my life and present findings and results for critical discussion. They in turn are asked to judge my work constructively and offer suggestions as to how I can improve and/or change my inquiry (p. 81).

I have two primary purposes in writing this thesis. One of my purposes is to describe and explain my living educational theory (Whitehead, 1989, 1993, 1999) by telling the story of my life as a woman manager in an educational administrator position and to offer it as personal practical knowledge (Connelly & Clandinin, 1999). I am contributing to that new scholarship of enquiry (Schön, 1995; Whitehead, 1999) as I work to improve my practice and create new knowledge to add to the academic knowledge base of the superintendent. The other purpose is to demonstrate and explain the impact on improving learning and teaching when teachers and administrators in my district conduct action research, researching questions of the kind, 'How do I improve my practice?' (Whitehead, 1989, 1993, 1999). I believe this purpose extends as well to improving schools as described by Colin Smith (2001) in "School Learning and Teaching Policies as Shared Living Theories: An Example." and to influencing social formations (Bourdieu, 1990).

To accomplish my purposes, I use a number of genres within the action research process including narrative, auto/biography and self-study. Zoe Parker (1998) captures the dilemma of definition in this kind of inquiry:

Within the qualitative approach to enquiry, narrative enquiry is a significant strand. Within narrative enquiry, auto/biography is a further strand. This simple taxonomy allows one to situate auto/biography as a genre of enquiry. This carries with it advantages of clarity and difficulties of over-simplification. These are parallel to those one encounters when attempting to define literary genres and place individual works within specific genres. As soon as one defines a text within a box or boundary, the text defies its placement there. It reveals complexities which question its unproblematic situatedness within the genre: one where it has been trapped (p. 116).

I concur with Parker's (1998) analysis of the challenge of research in education and especially propositional arguments in the postmodern era and yet you will find evidence of traditional arguments in my thesis:

The problematics of postmodernism force one to recognize that any proposition is questionable. Postmodernism critiques research in education as powerfully located in a modern, progress oriented, and humanistic enterprise. Education has been and remains a project which is concerned with the development of each individual's potential (as discussed by Usher and Edwards, 1994, pp. 24-32, for example) (p.116).

In this action inquiry I explore the nature of my educative influence as a superintendent. Through the writing and analysis of narratives, I express, define and communicate my valuing of the other in the midst of hierarchical and power relations as a living standard of practice and judgement for testing the validity of claims to educational knowledge and theory. My "landscape is personal, contextual, subjective, temporal, historical, and relational among people" (Clandinin & Connelly, 1999). Through the description and explanation of my life, through the creation of a professional identity (Clandinin & Connelly, 1999) by storying (Carter, 1993) and re-

storying my life and through insider (Anderson & Herr, 1999) practitioner research, a knowledge base of what it means to be a senior educational administrator emerges.

As well I found the work of Judi Marshall (1999) on *living life as inquiry* resonated with me:

By living life as inquiry I mean a range of beliefs, strategies and ways of behaving which encourage me to treat little as fixed, finished, clear-cut. Rather I have an image of living continually in process, adjusting, seeing what emerges, bringing things into question. This involves, for example, attempting to open to continual question what I know, feel, do and want, and finding ways to engage actively in this questioning and process its stages. It involves seeking to monitor how what I do relates to what I espouse, and to review this explicitly, possibly in collaboration with others, if there seems to be a mismatch. It involves seeking to maintain curiosity, through inner and outer arcs of attention, about what is happening and what part I am playing in creating and sustaining patterns of action, interaction and non-action (p155).

My research on my practice is very much contextual, abstract and imprecise but very real:

Through action research people can come to understand their social and educational practices more richly by locating their practices, as concretely and precisely as possible, in the particular material, social and historical circumstances within which their practices become accessible to reflection, discussion and reconstruction as products of past circumstances which are capable of being modified in and for present and future circumstances. While recognizing that every practice is transient and evanescent, and that it can only be

conceptualized in the inevitably abstract (though comfortably imprecise) terms that language provides, action researchers aim to understand their own particular practices as they emerge in their own particular circumstances, without reducing them to the ghostly status of the general, the abstract or the ideal – or, perhaps one should say, the unreal (Kemmis & Wilkinson, 1998, p. 25).

Several excellent summaries of the literature in the field of action research can be found. One of these is Susan Noffke's chapter, "Professional, Personal, and Professional Dimensions of Action Research" (in Apple, M. (Ed.) (1997) Review of Research in Education, 22) with which I engage in the thesis.⁴ The Appendix to Ben Cunningham's Ph.D. is a useful summary of the historical roots of action research, many research leaders in the field up to 1999 and the form of action research that the students of Jack Whitehead understand in answering the question, 'How do I improve my practice?' (Cunningham, 1999). A more recent publication, Geoff Mills' (2000) Action Research: A Guide for the Action Researcher is a useful guide for beginning teacher researchers although his use of "practical action research" (p.9) seems redundant since it seems to me that its essence is in the practice. Most especially, I and many others (June 27, 2001, 32,000 hits to the website) have referred to Jack Whitehead's Ph.D. thesis (Whitehead, 1999) and web page - <http://www.actionresearch.net> - both of which have informed my research and writing. I want to establish that "justifying" (Mills, 2000) the choice of action research as a legitimate process may have been essential when I first started the research in 1996. I have seen the dramatic change in its acceptance at the American Educational Research Association (AERA) annual meeting over the last seven years. In 2002 in New Orleans, action research was on the agenda of many researchers. In several sessions that I attended, the rooms were full to overflowing with questions of the sort, "I have to teach a 10-week module on action research in my program. Can you help me?" as teacher educators from across the globe were distressed that they had been mandated to teach these modules with no experience.

⁴ See Chapter 2B.

What I do want to make clear is that the process that I am using is a particular approach to action research developed by Jack Whitehead (1989, 1993, 1999), a discipline of educational inquiry-“living educational theory”. Ten Ph.D.’s at Bath University in the living theory section of Jack’s website (and several others at Deakin, Exeter, Curtin, Kingston) provide testimony to the value of the process in contributing to the knowledge base of practitioner research.

Our perceptions of the world are based on a number of things from childhood experiences to schooling to job-related crises. One source of my perceptions of advanced academic research and writing was from conversations with colleagues. I would frequently hear that their professors/supervisors had given such specific direction that they felt they were no longer the author of their own work and felt no ownership or joy in their final projects or theses. I wondered what then was the point of the exercise? Phyllida Salmon explains the qualities that she believes the Ph.D. student must have: awareness of the personal significance of the work and that such work is transformative of the person carrying it out; ownership of the ideas expressed within it; creativity and vision to produce new meanings; intellectual courage to cope with the tentative and uncertain nature of such enquiry. She puts forward these ideas in direct opposition to a positivistic view of the Ph.D. as research training (Salmon, 1995, p. 9, 10 in Parker, 1998).

I am in agreement with the description of the action research process “as a messy series of false starts” by Ph.D. student, Mary Hanrahan (1998). “What may appear to some people as a messy series of false starts and changes in direction, now appears to me to be a rational progression in my ideas about the most appropriate goals and methodology for research in education.” While I had my share of difficult times, I never felt as she did, being doubted by her supervisor and “that there was something wrong with me and my methods.” In the end, though, I felt as she did that the research has led “to much personal growth for me and a new zest for life” (p. 305).

So when I came to do my own research and write my thesis, I knew intuitively that I would have to conduct the research and write the thesis in a way that made ontological sense to me and that reflected my ways of knowing and being. I knew without full understanding at the time that I was opposed to a purely scientific method of “gaining understanding of the world”:

Academic knowledges are organized around the idea of disciplines and fields of knowledge. These are deeply implicated in each other and share genealogical foundations in various classical and Enlightenment philosophies. Most of the ‘traditional’ disciplines are grounded in cultural world views which are either antagonistic to other belief systems or have no methodology for dealing with other knowledge systems. Underpinning all of what is taught at universities is the belief in the concept of science as the all-embracing method for gaining an understanding of the world (Smith, 1999, p. 65).

I find action research to have a very spiritual as well as practical aspect much as Peter Reason describes in “Action Research As Spiritual Practice” (2000) and as Ben Cunningham lived in his thesis, How do I come to know my spirituality as I create my own living educational theory? (1999). I resonate with Jerry Allender (2001) as he describes why he chose self-study:

Objectivity is an obsessive concern in Western culture, and this obsession distracts from a larger worldview. Besides annoying encounters with narrow conceptions of objectivity in daily life, like academic committees paralyzed for lack of the right numbers, other experiences have been particularly troublesome for me as a teacher. My actions in the classroom, what I want education students to learn, and the research I do on the process of teaching have all been affected. More difficult yet, the emphasis on objectivity masks the power of self-knowledge... (p. 2).

To attempt to create a holistic picture of my learning and improvement as a superintendent of a large rural and semi-urban school district in Ontario, Canada, Grand Erie District School Board (GEDSB) over six years is to challenge traditional forms of data representation and research in educational administration. With this in mind, I wish to bring my voice into the knowledge base of educational leadership to respond to Beatty (2000): “Indeed, what is missing from the knowledge base for the emotions of leadership are the voices of leaders themselves” (p. 332).

WHAT APPROACHES DID I USE TO CONDUCT MY RESEARCH?

How can I transform the story of my learning through five years studying my practice that is visually and physically spread out in my recreation room on a huge table? What would it look like to show the meaning of the values I hold and transfer the documentation on the table to reveal my learning? How can I describe and explain my learning within my internal capacity and energy to sustain my own learning and to engage and support the learning of teachers and administrators for the purpose of enhancing student learning? Looking at the photos puts me in touch with my values: I am different people in different contexts with the values I hold as the unifying force. The story appears like rivulets running across the plain to converge into a river of



This table in my recreation room allowed me to see in visual form the processes and patterns of my learning over the 6 years. I had to add new surfaces as the papers data trail grew.

knowing and theorizing about my life as a superintendent. In

terms of my own learning the spider plant metaphor that Gareth Morgan (1988) uses may help to explain how I learn a skill or aspect of knowledge and teach others what I have learned. Once the other person has learned the skill, he/she becomes independent of the direct support as an autonomous individual. The list of my learning and teaching

is long: the action research process, the use of digital still and video cameras, staff development and leadership, curriculum, assessment and special education and so on.

Much of my data collection, analysis, synthesis and writing concerns the role of the professional educator, my role as teacher and as learner. I am creating myself in a process of *improvisatory self-realization* (Winter, 1989) using the art of the dialectician, in which I hold together “in a process of question and answer, [my] capacities for analysis with [my] capacities for synthesis”:

What I think distinguishes my work as a professional educator from other professionals such as architects, lawyers or doctors is that I work with the intention of helping learners to create themselves in a process of improvisatory self-realisation (Winter, 1998). Stressing the improvisatory nature of education draws attention to the impossibility of pre-specifying all the rules which give an individual's life in education its unique form. As individuals give a form to their lives there is an art in synthesizing their unique constellations of values, skills and understandings into an explanation for their own learning. I am thinking of the art of the dialectician described by Socrates in which individuals hold together, in a process of question and answer, their capacities for analysis with their capacities for synthesis (Whitehead, 1999).

In Peter Mellett's Review (2000), a clear description of my intention to “make a claim to knowledge and a claim to life” is articulated:

Writers associated with the academy, educational action researchers, and those from other arenas who comment on their endeavours, are all making claims from within their writing to have knowledge. My own claim is that the writers of good-quality educational action research accounts are making a claim to know their own form of life: I am

suggesting that, through our practices and our texts, we are making a claim to knowledge and a claim to life. We link their own lives with the lives of others in order to bring about an improvement that is life-enhancing and life-affirming. We are showing how we strive to live out our values of freedom, democracy, and justice in our shared lives (p. 28).

As I describe this research process, I am reminded of Schön (1995) talking about the fact that “know-how is *in* the action” (p. 29) and that refers to acts of recognition and judgment as well as to physical skills. He refers to Polanyi’s “tacit knowing” which is so difficult to define:

Michael Polanyi, for example, has written about our ability to recognize a face in a crowd. The experience of recognition can be immediate and holistic. We simply see, all of a sudden, the face of someone we know...Polanyi speaks of perceiving from these impressions to the qualities of the place. [This is] what Polanyi calls "tacit knowing" (p. 30).

I have been reminded frequently, particularly in the Validation Group responses in 1997, 1998, 2000 and 2001 that I need to describe and explain my actions and reflections deliberately because I experience them as inherent and need to make the implicit, explicit. Schön (1995) describes a situation where a piano teacher sees an error in a student’s work but must play it herself in order to be able to help the student as a means to show that we need to see ourselves in action:

Often, we misstate what we know how to do. Indeed, when we ask people to describe what they know how to do, we are likely to get an answer that mainly reveals what they know about answering the question. If we want to discover what someone knows-in-action, we must put ourselves in a position to observe her in action. If we want to

*teach about our doing, then we need to observe ourselves in the doing,
reflect on what we observe, describe it, and reflect on our description*
(p. 30).

The method of inquiry I have used has evolved over time but there are some constants from March of 1996. From the beginning I have had a concern for truth and being true to myself and my responsibilities, a preference for a visual forms and dialectical and dialogical processes and the requirement that the research help me improve (become a better superintendent) as I made an original contribution to the knowledge base by developing my own "living educational theory." (Whitehead, 1989). In my life and work I believe in collaboration. I hold the same belief in research. I have engaged many people, my children, colleagues, university academics, friends, strangers at conferences, formally and informally, by sharing, talking about, and requesting responses to my research. I have embraced many willing, caring collaborators.

During the years that I have been researching and writing, years of massive change in education, I have performed a demanding job, superintendent of schools, always striving to meet my own highest expectations and standards. And at the same time I have been an active single parent. There have been no study leaves or sabbaticals, only holidays, evenings and weekends. However, the advantage (or disadvantage) of experiential, reflection on and in action (Schön, 1983), self-study action research is that I live, eat and breathe the research. There is no separation from it; it pervades by life and work. Research of this kind "is often linked with the researcher's life process, as they pursue topics of personal relevance and hope to achieve life development as well as intellectual insight" (Marshall and Reason, 1987; Marshall, 1992 in Marshall, 1995, p. 24). I have "a personal stake and substantial emotional investment" (Anderson & Herr, 1999) in my project and I am "experience- near" (Geertz, 1983 in Anderson & Herr, 1999) to the work. Because I have engaged so many people in the process, I have also been teaching others the process as I have been learning it. It has been very symbiotic and synergistic.

I will elaborate on my approaches to the research. I have conducted my research through analysis and synthesis of an extensive data collection; writing, sharing and rewriting; learning through the writing process; giving the thesis a form; using photos and video in image-based research; emphasizing dialogic research and voice, and; becoming a practitioner-scholar. As I have conducted my research, my methodology has been one of 'meaning-making' from the data and my life.

Analysis and Synthesis of an Extensive Data Collection

The research database, which includes some quantitative but, primarily, qualitative data, is extensive. It includes journals expressed as e-mails, case studies, audio and videotapes, transcripts of meetings and interviews, meeting minutes, surveys, reports and policy and procedure documents, print, video and electronic publications - mine and others', film and digital photographs, and validation responses and meetings. Over the six years, I have kept journals, daily and often more than once a day, of my activities and reflections by means of e-mails to Jack Whitehead. This was part of the dialogical process. I also have records of e-mails to other academics and professionals that serve to show the progress of various directions in my work and life. I have found that I need an audience for my thoughts as well as a respondent.

Over several months late in 2000, I read and reviewed and sifted and reflected on my collection of data spread over an old pool table extended via other surfaces. Visiting and revisiting the data has been essential to understanding because it is "difficult for the action researcher to grasp everything at once and data may need to be revisited in the light of new experiences" (James, 1999) I re-read and reflected on my narratives of school board amalgamation, supporting action research projects, creating the masters program in partnership with Brock University, my published writings and validation papers, my performance evaluations and looked with new eyes at the hundreds of photos I'd taken over the six years.

My standards of practice and judgment emerged as I peeled back the layers while I turned my life in my mind and looked at new faces of the whole. I found that standards connected and overlapped and I allowed them to do so. For some time I deliberately avoided forcing a form on my theorizing, fearful that my need to control would limit the opportunity to learn more deeply through the process of writing, reflecting and re-writing. I have a firm belief in the value of learning as a transformatory process and of writing as a learning process. Laurel Richardson (1994) terms this, "writing as a method of enquiry, the process by which we come to knowing through our writing" (p. 4). I found that each piece of writing changed my knowledge and increased my capacity to theorize. As Van Manen (1988) says, "we are unable to do much more than partially describe what it is we know or do. We know more than we can say and will know even more after saying it" (James, 1999).

In describing and explaining my standards in February, 2001, (DeLong, 2001a)¹ I included a number of vignettes that I intended to give life and vitality to my standards. Then and now, I wish most fervently to avoid the "linguistic checklists" (DeLong & Whitehead, 1999) prevalent in the work of professional bodies like the Ontario College of Teachers and the (UK) Teacher Training Agency. And yet, I found myself initially presenting nothing less than a list of standards like posts in a fence. I found representing lived experience (VanManen, 1990) to be a messy process of improvisatory self-realization (Winter, 1997) challenging and less than satisfactory when what I had produced appeared to be clearly-defined but lifeless categories and lists of what I called 'my *living* standards.' There was a certain irony there. However, I realized in the three-week period that I was at the University of Bath in March 3-25, 2001 that the fifteen standards I had written in February needed further synthesis and evaluation. In this thesis you will see that transformation over the next twelve months where I have come to know them in two values that are my standards of practice and judgment.

¹ See pp. 384-428 of the Appendices.

Writing, Sharing and Rewriting

It seems to me that the written word is limited in its capacity to represent my life as an educator and “insider researcher” (Anderson & Herr, 1999; Anderson & Jones, 2000; Reihl et. al., 2000). Much has been written about the acceptability of alternative forms of data representation (Eisner, 1997); however, there appear to be few exemplars to follow. Certainly narrative, which “blurs the distinction between science and art” (Allender, 2001, p.2), is one useful form of representing my life that I use. I do find, however, that the printed word is limited both my capacity to creatively describe and explain and the limitations of the language to capture aesthetics, spirituality and emotion. Part of my challenge is to capture in a tangible form the passion I feel and the “life-affirming energy” (Bataille, 1962; Whitehead, 2000) I hold for education and educators.

George Bataille (1962) describes the limitations of language and the desire I share with many others to “understand the riddle of existence” and “seek the heights” while recognizing that:

This body of thought would clearly not be available to us if language had not made it explicit.

But if language is to formulate it, this can take place only in successive phases worked out in the dimension of time. We can never hope to attain a global view in one single supreme instant; language chops it into its component parts and connects them up into a coherent explanation. The analytic presentation makes it impossible for the successive stages to coalesce.

So language scatters the totality of all that touches us most closely even while it arranges it in order. Through language we can never grasp what matters to us, for it eludes us in the form of interdependent propositions, and no central whole to which each of these can be referred ever appears. Our attention remains fixed on this whole but we can never see it in the full light of day. A succession of propositions

flickering off and on merely hides it from our gaze, and we are powerless to alter this.

Most men are indifferent to this problem (p.274 -275).

Given its limitations and recognizing that it is still the primary mode of sharing knowledge, I have combined written language with image-based research (Mitchell & Weber, 1999; Prosser, 1998; Schratz, 2001; Walker, 1993). Recognizing the limitations of language is important but also important to me is my learning through the writing process.

Learning through the writing process

One of the "ah ha's" of researching my practice and of teaching others the process has been the significance of writing for reflection and learning. Now you would think that a person with an undergraduate degree in English who taught the subject to high school students for eight years (1966-72; 1980-82) would already know this. Perhaps I did as "tacit knowledge" (Polanyi, 1958), but not to the depth that I now know it. In a thoroughly enjoyable book that I used in teaching the masters Narratives Course⁶, The Right To Write, Julia Cameron (1998) talks about the nature of writing:

Although we tend to think of it as linear, writing is a profoundly visual art. Even if we are writing about internal experience, we use images to do it and about the need to write:

We should write because it is human nature to write.

Writing claims our world.

It makes it directly and specifically our own.

We should write because humans are spiritual beings and writing is a powerful form of prayer and meditation, connecting us both to our own insights and

⁶ See Chapter 3B.

to a higher and deeper level of inner guidance.

We should write because writing brings clarity and passion to the act of living.

Writing is sensual, experiential, grounding.

We should write because writing is good for the soul.

*We should write because writing yields us a body of work,
a felt path through the world we live in.*

*We should write, above all, because we are writers,
whether we call ourselves that or not.*

(p. 55, 56).

This writing about myself is intensely personal. I feel vulnerable but not at risk. I have not intended to make any of the people I have included in the writing uncomfortable or at risk. I have checked back many times to ensure that I have been ethical and fair. After reading Chapter One which is about him, Peter Moffatt wrote back to me: "Thanks. I enjoyed and learned from reading the last two sections. You have used your reflective mode to make sense and find satisfaction in work." (handwritten note, 15/08/01) The narrative has been written with love and with a sincere desire to understand and improve my own practice and to explain the life of an educational leader with clarity. Cameron (1998) likens this to the act of singing:

In the practice of singing, much can be done with technique. There is, however, an elusive something that comes when the singer "sings with love." That intention brings to the voice a purity that is at once evanescent and unmistakable. The same purification happens to our writing when we write with loving intent. It is a great paradox that the more personal, focused, and specific your writing becomes, the more universally it communicates (p. 54).

In my work whether it be delegating a task to someone or committing to the process of accomplishing a task through a committee or project management team, I have to **trust the process**. I have frequently advised groups who are undertaking practitioner

research to just let the action-reflection process, the journaling and dialogue with critical friends, and the writing and sharing happen, **to trust the process**. Amazing how difficult it is to take your own advice! I now know that **I can trust the process**. The actual writing, reflecting, dialoguing, revising, and revising again, has created my knowing. At the beginning of writing, I had masses of research data, a messy rummage of thoughts and ideas, confusion and chaos, and an excruciating need for order and clarity.

You would laugh if you could see the family/recreation room that I converted to a writing centre for the writing of this thesis. See the photo above. There is no order or clarity here. The reason it works for me is that I am a holistic thinker and need the picture of the whole before I can deal with the pieces. It is one of the reasons I struggled with the learning of math in high school from very sequential teachers. I was thirty-five years old and an occasional teacher teaching classes of business math when I realized this. So having chart paper on the walls with timelines and themes and all my research data, books, publications and photos spread out visibly was an essential environment for me to write. Only then could I start the integration:

Writing is a valuable tool for integration. The root of the word "integration" is the smaller word "integer," which means "whole." Too often, racing through life, we become the "hole," not the "whole." We become an unexamined mass into which our encounters and experiences rush unassimilated, leaving us both full and unsatisfied because nothing has been digested and taken in.

In order to "integrate" our experiences, we must take them into account against the broader canvas of our life. We must slow down and recognize when currents of change, like movements in a symphony, are moving through us (Cameron, 1998, p.107-108).

I wrote the thesis the same way that I live and work - with intensity. With the exception of short breaks such as walks, conversations with my friends and children, I

usually wrote for eight to ten hours a day, weekends and holidays. I found an hour here and there was not productive. Because of the random nature of my thinking processes (DeLong & Wideman, 1996), I usually worked on three or four documents on the computer screen at once plus the references page and the parking lot, and pulled a new one up as I found a connection to another. I would move back and forth between my data, the literature, thinking, writing, and revising. I place great importance on connections and patterns and wish to connect my life and research with you in the spirit of Gregory Bateson (1980):

In every instance, the primary question I shall ask will concern the bonus of understanding which the combination of information affords. The reader is, however, reminded that behind the simple, superficial question there is partly concealed the deeper and perhaps mystical question, "Does the study of this particular case, in which an insight develops from the comparison of sources, throw any light on how the universe is integrated?" My method of procedure will be to ask about the immediate bonus in each case, but my ultimate goal is an inquiry into the larger pattern which connects (p. 73).

I did not separate the literature search into a separate compartment as in the traditional academic search but engaged with the academic research as it came into the subject of the writing or triggered some critical judgments in my data analysis, synthesis and evaluation:

The good news is that the Handbook of Research on Teaching, edited by Richardson (1998) does have a chapter dedicated to practitioner research, albeit written by academics. Zeichner and Noffke (1998), the authors of the chapter, suggest that it may be premature and perhaps inappropriate to engage in the academic style literature reviews of teacher research. Instead they argue that research done by teachers should not be seen as

merely an extension of the current knowledge base but rather a challenge to existing forms of knowledge (Anderson & Herr, 1999, p. 13).

My train of thought being what it is, more like a moving target than a straight line, I kept a section at the end of each document called "Parking Lot". As a new idea, memory, image, or connection would wash through my mind, I would "park" it in the parking lot and come back to it later. This process was similar to what Ron Wideman and I came up with as we worked on the book Action Research: School Improvement Through Research-Based Professionalism (1998b), only in that case to retain my random thoughts and to keep us on task I used post-it notes stuck on the table. This process of parking an idea or process is reflected in my life. When a project is not working, I park it until the constellation of factors that will make it come together emerge.

Giving the thesis a form



On March 13, 2001, in Jack's office I printed out my writing over the six years of research and forced them into a purple binder. It was a cathartic event because it had a form, a very imperfect one but at least a form.

The final throes of creating a thesis out of a mishmash collection of writing began with the writing and rewriting of my abstract on March 8, 11 and 12, 2001. When I presented it to the Bath Action Research Group on March 12, Robin Pound, one of the researchers in the group from the nursing field, felt that there was something missing and wanted to include some of my learning while Sarah Fletcher, lecturer and Ph.D student at Bath, said that she thought the "Wow" was missing. Jean McNiff said that the abstract was elegant and exciting and that if I could write the thesis that the abstract described, she would like to read it.

Just a little challenge! Jack wondered if it needed a photo. I redrafted it on the March 20th. This process was described and explained in our AERA paper presentation (Whitehead & Delong, 2001).¹

On March 9, 2001, I drafted a structure for the thesis with possible chapters, which was redrafted many times over the next four months. On March 13, I printed off the writings that I had produced in the five years of the research, organized them into the chapters I had proposed. It was an ugly, overstuffed binder of papers but at least now I could see a whole: a behemoth challenging me to make it aesthetically pleasing. Stephen Taylor's (2001) paper, "'That Was Ugly'": Assessing Organizational Aesthetic Performance", made a connection. However, I began to see a flow because as I was organizing, I was writing Chapter Four which I had named 'My Learnings' which is now integrated into several chapters in the thesis. There was a flow back and forth of reading, reflecting, synthesizing and writing.

Then I started on a Table of Contents page of what the reader could expect to come across in the thesis. I needed to make connections for the reader so that he/she could move back and forth in time in each of the areas of the work and my learning. It needed a means for the reader to make the connections. I came upon the idea of footnotes as connectors.

As I wrote I could sense the emerging theorizing about my life as an educational leader. There was an emerging knowing that had not been there before the writing. The writing process mirrored my life and how I manage to keep multiple tasks and levels of activity held together, how I organize my life as a superintendent by integrating the personal and professional, and how I manage to live out my values within a political and economic system of education in complex and tumultuous times. Some examples of my writings can be found in Part A of the Appendices.

¹ See pp. 429-444 of the Appendices.

Photos and video in image-based research

Photos are powerful for filling out and adding feeling and enhanced complexity to the written description of an event. When the only person in my first validation group meeting, February, 1997, who understood my job from my description in the paper, (DeLong, 1997a) was Peter Moffatt, the Director of Education⁸ (who had been a superintendent in the same district himself), I attributed the problem to my incapacity to communicate my role to my inadequate writing skills. Over the subsequent years I have come to realize that images, whether metaphors, graphs, visuals, drawings, or photos, are essential to my clarity of thinking and writing. They also provide a support that enhances the written word and may address the concern of Bataille's (1962) that "through language we can never grasp what matters to us" (p. 274).

I have been very specific in this title because I recognized the concern of Walker (2001) around the word 'image': "The use of the word 'Picture' rather than 'image' is intentional. You could fill a library with books that have the word image in the title, but contain no pictures" (p. 1). I will be referring to photos and videos in my language of image-based research and will be including them in the thesis, bearing in mind Jon Prosser's (1998) view that they play "a relatively minor role in qualitative research" (p. 97). They are significant in my research.

Throughout the research, I have struggled with the problem of representation. During a January 20, 2001 overseas telephone conversation with Jack Whitehead, I decided to see if integrating a few of the many photographs from my research would assist in giving life to my standards. I had inserted them with considerable difficulty into my December 5, 1997 response to the research committee at Bath. For me, photos are a powerful way of relating to individuals. That simple act (I use the word 'simple' loosely because learning the process of inserting them into the text was not 'simple' and at one point actually crashed a computer) transformed my thinking and writing because when I am working, thinking or planning, I am holding people in mind. "The

⁸ See Chapter 1.

value of the single photograph lies in its potential to help uncover layers of meaning” (Mitchell & Weber, 1999, p.101). I find that the photo or “vernacular portrait” (Mitchell & Weber, 1999, p.77) links the image to the person with an immediacy that helps me sustain the feeling or thought. It is inherent in my standard of valuing the other and a means to create a link to another person with a permanent record. Photographs enable me to make connections with and among people and events, both within my research and my life. The use of video goes even further in explaining my life as you will see in Jack’s website www.actionresearch.net. As Mitchell and Weber (1999) point out that:



Jack Whitehead, my Ph.D supervisor, and I in dialogue about creating my thesis on August 1, 2001. Note the videocamera in the foreground. We frequently taped our dialogue in order to trace the process of my developing methodology.

...images and sound and movement over time...yields a self-representation that is different from the still photo, one that appears more fluid than frozen, confronting us, not with a single slice or drop we can put aside under the microscope and decontextualize at our leisure, but rather with a running stream that presents multiple examples, variations, and complexities--perhaps even contradictions and tensions. In comparison with a photograph, video is a more complete and noisy text...Viewing this self-representation may problematize the way we think of ourselves, challenging our idealistic mental snapshots. But it can also reassure us, providing a wider sampling of images and behaviour from which to choose the ones that we feel 'capture' us (p. 193).

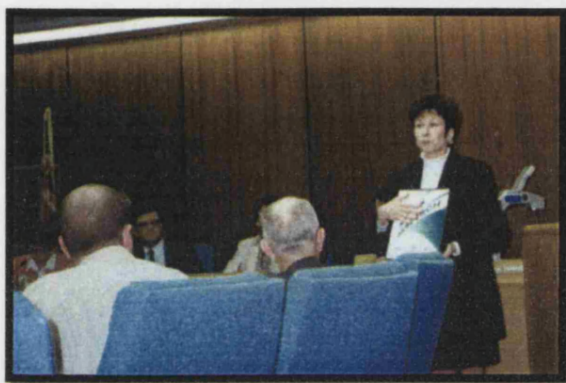
I have collected and analyzed some more “fluid than frozen” (Mitchell & Weber, 1999, p. 193) video clips on CD-ROM in my data archive and have used them frequently in presentations (Whitehead & Delong 2001a).

I was interested in the work of Walker and Schratz presented at the Second Annual CARE Conference Applied Social Research: Method and Practice on 23-23 July 2001 at the University of East Anglia, Norwich, UK on image-based research. I am in agreement with Walker (2001) that photos put the researcher in the work. "Often in the narratives that you encounter in research, the author remains 'above' the text, looking down (just as a geographer's gaze is typically that of the bird's eye view)" (p. 9).

The meanings that the photos carry go beyond the first impression since "they connect to other places, other projects and other sets of meanings" (Walker, 2001, 13) and carry meanings of great import to the understanding of the writing and their use "touches on the limitations of language, especially language used for descriptive purposes. In using photographs the potential exists, however elusive the achievement, to find ways of thinking about social life that escapes the traps set by language" (Walker, 1993, 72 in Schratz, M., 2001, 4). I feel as Walker does that "looking at the photographs creates a tension between the image and the picture, between what one expects to observe and what one actually sees. Therefore, images 'are not just adjuncts to print, but carry cultural traffic on their own account'" (Walker, 1993, 91). He also wanted to use the photograph in order to "find a silent voice for the researcher" (Walker, 1993, 91 in Schratz, M., 2001, 4). Michael Schratz shares his and Walker's thoughts on the use of pictures in research:

"Despite an enormous research literature that argues the contrary, researchers have trusted words (especially their own) as much as they have mistrusted pictures." (1995, 72) For them the use of pictures in research raises the continuing question of the relationship between public and private knowledge and the role of research in tracing and transgressing this boundary. "In social research pictures have the capacity to short circuit the insulation between action and interpretation, between practice and theory, perhaps because they

provide a somewhat less sharply sensitive instrument that works and certainly because we treat them less defensively. Our use of language, because it is so close to who we are, is surrounded by layers of defense, by false signals, pre-emptive attack, counteractive responses, imitation, parodies, blinds and double blinds so that most of the time we confuse and even (perhaps, especially) ourselves” (Schratz and Walker, 1995, 76) (Schratz, 2001, 3-4).



On April 6, 1998, I was launching the Action Research Kit and thought I was hiding my unhappiness at the prospective loss of my job but despite the pleasure I felt in the work we'd done in the kit, my presence was not happy.

Photos have great depth of meaning for me and seeing them evokes memories, emotions and thoughts. You will note that the photos are of people, not

events. The people in the photos are part of my life and my research and they want to be included. I would not be able to create this thesis without the people in the photos in mind. They also reveal facts of which I had been unaware. An example is the obvious strain that I was experiencing at the time of the launch of the Action Research Kit, ⁹a strain that I thought I was successfully hiding from the world. The photos revealed the truth. “According to Susan Sontag (1979, 88) photos are not only evidence of what an individual sees, not just documents but an evaluation of the world (view). They present a “vision” of the relationship between subjects and objects, which manifests itself in the snapshot” (Schratz, 2001, 18).

The visual representation became increasingly important in my research because taking and sharing photos was part of my living my life and I found that including them in my writing provided a means for me to understand my life and work and to communicate that to my audience. I use the sharing of them as well as a means to connect with people and build relationships. Most people I know like to get copies of

photos to remember events and places and I consistently do that, always a camera in hand and getting and sharing extra copies of photos.

In order to communicate as clearly as I can “in the full light of day” (Bataille, 1962, p. 275), I use still photos and where possible video-clips to enhance the capacity of the words. The voices of the people in transcribed conversations, interviews and reports who have lived with me through these years of my research add depth and strength to my own voice as I explain my embodied knowledge. On the cover of Ben Okri’s Birds of Heaven (1996) is the reminder:

*We began before words
And we will end beyond them.*

Dialogic research and voice

In this thesis I wish clearly to emphasize the role of dialogue in my learning to improve and my commitment to retaining the integrity of my own voice as a practitioner and to encouraging other practitioner-researchers to share their learning **with their own voices**. I intend that my work and that of the researchers that I have encouraged and supported will strengthen the evidential base necessary to create that body of knowledge base of teaching and learning theory from the location of practice.

One of the things that I learned about myself in the process of researching my practice was that I extend my learning by thinking out loud, in dialogue with others. Being that I conducted most of my research over three thousand kilometers away from the university and my supervisor and with no study group, I was dependent on e-mail for dialogue. The first problem was to get connected via internet e-mail. The story from the inception of the process on February 22, 1995 at the Act Reflect Revise Conference in Toronto to the writing of the thesis is one of frustration in learning to make the technology work. In fact the evidence of that

⁹ See Chapter 3B.

frustration recurs repeatedly in the e-mails through the entire process of the study. Jack had visions of our using the videoconferencing capacities to talk but despite many attempts with various software, it is only as I am finishing my writing of the thesis that we actually finally connected on August 24, 2001. It was a happy event. At least we reached that goal.

David Coulter (1999) argues for dialogic research in his article in the April 1999 issue of Educational Researcher and uses the work of Bakhtin (1895-1975) as the basis for his proposal that dialogue can improve research and its application to practice. "Bakhtin offers some criteria to use in thinking about how truth is made between speakers in dialogue" (p. 5). He also ~~says~~ cites Maxine Greene (1994) for a conception of research as dialogue in which:

[w]hat matters is an affirmation of a social world accepting of tension and conflict. What matters is an affirmation of energy and the passion of reflection in a renewed hope of common action, of face-to-face encounters among friends and strangers, striving for meaning, striving to understand. What matters is a quest for new ways of living together, of generating more and more incisive and inclusive dialogues (p. 459).

Coulter (1999) says that Bakhtin's overriding concern with dialogue is that it is not simply verbal interchange, but the

single adequate form for verbally expressing authentic human life...Life by its very nature is dialogic. To live means to participate in a dialogue: to ask questions, to heed, to respond, to agree, and so forth. In this dialogue a person participates wholly and throughout his whole life (Bakhtin, 1963/1984a, p. 293) (p. 5).

According to Coulter (1999), Bakhtin "distinguishes between two kinds of meaning [in language]: the abstract or dictionary meaning and the contextual meaning...Language is never a unified system, never complete. Instead it reflects

the complexity and unsystematic messiness of experience. Language can be unified when life is unified.” (p. 6).

While one of my purposes in writing this thesis is to find my own voice, I have an innate need to share my learning and to support others to find their voices by: “finding the voices silenced or marginalized by monolithic practices”(Coutler, 1999, p. 9). As I supported Greg’s and Cheryl’s ¹⁰ research and writing and as I wrote with them, I encouraged them to share their hopes and fears and learning and growth to support others to give voice to their professional lives. Many of the voices of practitioner-researchers that I have had a hand in supporting can be found in The Action Research Kit (Delong & Wideman, 1998a,b,c), The Ontario Action Researcher (OAR) (Delong & Wideman, 1998-2002) <http://www.unipissing.ca/oar>, in An Action Research Approach To Improving Student Learning Using Provincial Test Results (Wideman, Delong, Hallett & Morgan, 2000), Passion In Professional Practice: Action Research in Grand Erie (Delong, 2001), in board reports and in provincial and local conferences.¹¹

Becoming a practitioner-scholar

It has been a demanding path to feeling confident in my knowing and knowledge and to feeling that I am a scholar. Through much of the period of research I questioned that capacity and needed much support and affirmation. So why did I need the affirmation? There are several reasons. Unlike the masters’ cohort, I have no peer group with whom to share ideas. Amongst my colleagues, no other superintendent is researching his/her practice; in fact, some take offense at it and only Peter Moffatt¹² even wants to hear about my research. Thank goodness for him. Second, I don’t see myself as an academic, an intellectual. Third, I have read and listened to enough criticisms of qualitative and action research that I think it undermines my confidence that my research, my knowing, my epistemology is accepted as valid. And last, of the several

¹⁰ See Chapter 2B.

¹¹ See Chapter 3B.

¹² See Chapter 1.

proposals that I have submitted to the Administration Division of AERA, only the ones that I have submitted with Jack have been accepted. Despite what seem to both Jack and I to be quality proposals, when I submit on my own they are not accepted. I guess practitioner research still has a way to go to acceptance. I do not want to leave this point without saying that I have already made plans to try again for 2003.

Having said that, I want them to be wrong about my work and my research. Gary Anderson and Kathryn Herr (1999) in Educational Researcher gave me hope in their article, "The New Paradigm Wars: Is There Room for Rigorous Practitioner Knowledge in Schools and Universities?" I hope, of course, that the answer to their question is a resounding "Yes". And through my own "battle of snails", I want to help create that room for other practitioners. They cite Donald Schön (1995):

It is a battle of snails, proceeding so slowly that you have to look very carefully in order to see it going on. But it is happening nonetheless.

According to Schon (1995) "the new scholarship" implies "a kind of action research with norms of its own, which will conflict with the norms of technical rationality-the prevailing epistemology built into the research universities" (p. 27). ... Nevertheless, we believe that the insider status of the researcher, the centrality of action, the requirement of spiraling self-reflection on action, and the intimate, dialectical relationship of research to practice, all make practitioner research alien (and often suspect) to researchers who work out of Gage's three academic paradigms.

Certain epistemological stances will be more of a threat to institutions than others will, and institutional structures and politics will, to some extent, determine the epistemological stances that can be safely advanced (p. 12).

The successful partnership with Brock University in the masters program gives me hope, too. I feel that we are creating some of that “room” that Anderson and Herr (1999) talk about:

The problems faced by professional schools such as colleges of education are complex, since members of these communities must legitimate themselves to an environment which includes both a university culture that values basic research and theoretical knowledge and a professional culture of schooling that values applied research and narrative knowledge. (Meyer & Rowan, 1977). Viewed by universities as lacking in intellectual rigor, colleges of education are, at the same time, often viewed by school practitioners as too theoretical and “out of touch.” Colleges of education have never walked this tightrope well, but the current crisis in teacher and administrator preparation, in which school districts are increasingly taking over the traditional functions of colleges of education, has forced the issue as never before (p. 12).

To describe the “battle” between the traditional forms of research and the practitioner research, Anderson and Herr draw from Schön’s concern about the adoption of technical rationality by colleges of education as disqualifying action research processes:

This view of professional practice undergirds much of the epistemological debate that marginalized naturalistic/qualitative inquiry as ‘nonempirical’ prior to the 1970’s and continues to largely ignore practitioner knowledge.

The coattails of legitimacy of qualitative research in the academy do not appear to be long enough to carry along action research done by school practitioners (p.13).

I think that is one of the barriers to the acceptance of practitioner research by the academic community and to my unwillingness for many years to engage in an advanced academic degree. Had it not been for Jack, I still wouldn't have. There is little in education (even budgets are values-based) that is divorced from "a personal stake and substantial emotional investment" (Anderson & Herr, 1999, p. 13). I can't do my job or my research without *substantial emotional investment*.

While Anderson and Herr (1999) feel that we are poised on the threshold of an outpouring of practitioner inquiry that will force important re-definitions of what "counts" as research, they recognize the restrictions that exist to having "schools as centers of critical inquiry in which teachers produce knowledge as they intervene in complex and difficult educational situations"(p. 14).

I take issue with their thinking that administrators and staff developers see teacher research as "the new silver bullet of school reform" (Anderson & Herr, 1999, p.14). In my work in Ontario and Quebec, I have not seen that. A relatively small number are even aware of practitioner research and where they are, it is seen as an option and given little sustained support. I know of only one school district where it has been mandated as a means to access certain Ministry of Education dollars for computer technology. I do have evidence that where teachers adopt the process of action research, they take control of their learning and become true professionals¹³ (Wideman et al, 2000; Delong & Wideman, 1996, 1998a,b,c, 1998-2002; Delong, 2001b; Squire & Barkans, 1999).

There is still a defining line that prevents me, and many practitioners, from seeing themselves as part of the academic community. Part of this is that our knowledge is seen as practical and inferior and not formal and therefore, not *real knowledge*:

For many academics, the acceptance of practitioner research is given only on condition that a separate category of knowledge be created for

¹³ See Chapter 3B.

it. This is usually expressed as some variation on “Formal (created in universities) knowledge” versus “practical (created in schools) knowledge,” and a strict separation of research from practice (Fenstermacher, 1994; Hammack, 1997; Huberman, 1996; Richardson, 1994; Wong, 1995a, 1995b) (Anderson & Herr, 1999, p. 15).

Fortunately, some inclusive academics like Whitehead, McNiff, Lomax, Russell, Cochran-Smith and Lytle, Clandinin and Connelly, Ghaye and Ghaye are determined to change a restrictive, exclusive and limiting view of academia to embrace and encourage practitioner research as real knowledge. They see that “the concept of teacher as researcher can interrupt traditional views about the relationships of knowledge and practice and the roles of teachers in educational change, blurring the boundaries between teachers and researchers, knowers and doers, and experts and novices. It can also provide ways to link teaching and curriculum to wider political and social issues” (Cochrane-Smith & Lytle, 1999a, p. 22).

As I cite the work of Cochran-Smith & Lytle and Clandinin and Connelly, I recognize that the reference to “practitioner” means “teacher” and not primarily “administrator”. In the notes (p.22) to the Cochran-Smith & Lytle (1999a) article, there is no reference to administrator. Clandinin and Connelly (1995) further divorce that connection by assigning administrators like myself the role of “conduit”. Before I leave this section on becoming a practitioner-scholar, I need to say that I hope that my work and research put into question the negative view of the administrator as “conduit”:

Researchers, policy-makers, senior administrators and others, using various implementation strategies, push research findings, policy statements, plans, improvement schemes and so on down what we call the conduit into this out-of-classroom place on the professional knowledge landscape (Connelly & Clandinin, 1999a, p. 2).

Throughout the book, the authors present a view that while they regret that they don't have the stories written by administrators, they paint program consultants, senior administrators and trustees with negative and harmful actions through being "the conduit" of processes such as implementation strategies. A missing piece in their work is the understanding of systems, political actions, market influences, mandatory legislation and other internal and external influences which impact on decisions made to keep a system of schools afloat and productive in improving student learning. It also assumes that leaders simply pass policies on without thought or supports. That has not been my experience.¹⁴

I feel that I am responding to the call for "insider" research by administrators, for collaborative efforts by school boards and universities and for the creation of a dissertation that will be an account of "ways administrators modify traditional methods to engage in research at their own sites" (Anderson & Jones, 2000, p.20). I embrace the inherent challenges of insider research and like Marshall (1995), "I see research as 'a distinctly human process through which researchers *make* knowledge'" (Morgan, 1983, p.7 in Marshall, p.25). I have tried not to take personally the criticism that has been lodged at me both by peers and other staff. Insider research has its inherent risks. I have managed to overcome the black days when it appeared that I would not bring the study to successful completion. Because it ~~is~~ a human process, my story, like my life, is imperfect, inconsistent, full of tensions and far from clear. I have tried to make the writing transparent.

I do not wish to exaggerate the pressure of researching in my own system but I do want to make sure that I don't understate it:

Patricia Hill Collins refers to "the outsider within" positioning of research. Sometimes when in the community ('in the field') or when sitting in on research meetings it can feel like inside-out/outside-in research. More often, however, I think that indigenous research is not

¹⁴ See Chapters 1, 2 & 4.

quite as simple as it looks, nor as complex as it feels” (Smith, 1999, p. 5).

As I felt when Lynne Hannay (1999) presented her research on action research in Brant¹⁵ and when the research on superintendents was presented at AERA in 1997, I share Linda T. Smith’s (1999) view that:

...the objects of research do not have a voice and do not contribute to research or science. In fact, the logic of the argument would suggest that it is simply impossible, ridiculous even, to suggest that the object of research can contribute to anything. An object has no life force, no humanity, no spirit of its own, so therefore ‘it’ cannot make an active contribution. This perspective is not deliberately insensitive; it is simply that the rules did not allow such a thought to enter the scene (p. 61).

I feel that writing my own insider story gives me a voice denied when others tell *about* the life of a superintendent.

However, having that voice does not mean that I have felt liberated to speak without constraint. In fact, I have probably been more careful about talking about my knowledge for fear of causing discomfort and as Peter Moffatt said at the February 17, 2000 Validation Group meeting, “Jackie has smoothed out some of the bumps.” There is good reason for that.

Sometimes epistemological dilemmas blur into political dilemmas since, as Foucault has argued, knowledge and power are intimately interwoven (Anderson and Grinberg, 1998). Because administrators exist within a force field of power relations a major threat to validity or

¹⁵ See later in this chapter.

trustworthiness of administrator research is the nature of the administrator role itself Anderson & Jones, 2000).

Because I have had the support of Peter Moffatt and have consulted with him as to the sensitivity of my research, I have been able to “tell the truth” (Anderson & Jones, 2000) with full awareness of risk so that I have maintained a “trustworthiness”.

Insiders have to live with the consequences of their processes on a day-to-day basis for ever more, and so do their families and communities. For this reason insider researchers need to build particular sorts of research-based support systems and relationships with their communities. They have to be skilled at defining clear research goals and ‘lines of relating’ which are specific to the project and somewhat different from their own family networks. Insider researchers also need to define closure and have skills to say ‘no’ and the skills to say ‘continue’ (Smith, L. T., 1999, 137).

Let me say that finding that closure to becoming a practitioner-scholar has been one of the most difficult aspects of my research. I am simply reporting on progress to date. The becoming continues.

HOW HAVE I VALIDATED MY CLAIMS TO KNOW?

When I submitted my transfer paper (DeLong, 1997a), I said that I would be using my values, the work of others and the Ontario College of Teachers' (OCT, 1998) draft standards as my criteria for judging the quality of my work. I find that my own standards of judgment are revealing themselves as I explain my life and the various parts of my job. Validity questions are often thorny ones and, much like the OCT Standards of Practice, validity criteria need to sustain a fluidity and flexibility about

them so that they are useful to the individual practitioner. Rigid checklists that create restrictive moulds will certainly limit the capacity of action research to capture the dynamic reality which is the life of a professional educator. Cheryl and I did try to conform to those standards¹⁶ and in the process of applying them to ourselves, we recognized how much we were acting in violation of our values (Delong & Whitehead, 1998). I no longer wish to use the OCT Standards of Practice as validation criteria except to remind myself that standards of practice must be continuously regenerated and spontaneous.

To ensure validity in this work and to demonstrate originality of mind and critical judgment, I have used a variety of validation processes using my own values as standards of judgment. I am validating my knowledge through the description and explanation of my embodied knowledge, the voices of the people in my life, engaging with the voices from the literature, external assessment, established academic criteria and public presentation and accountability.

The description and explanation of my embodied knowledge

First, I would say that my personal practical knowledge, informed by the description, explanation and synthesis of the dialogical and dialectical processes that I have used to research my practice over six years, is embodied in my data collection. I am using Polanyi's (1957) position of my "being conscious of having taken the decision to understand the world from [my own] point of view", as one means of validation:

As action researchers we each ground our epistemology in our own personal knowledge and theorize from that standpoint, each 'I' being conscious of having taken the decision to understand the world from his or her own point of view, as a person claiming originality and exercising personal judgement responsibly and with universal intent (Polanyi 1957). My dual aim in writing this text has been for it to be

¹⁶ See Chapter 2A.

acceptable from the point of view of current accepted standards of scholarship whilst, at the same time, giving a flavour of where a new scholarship (Schön 1995, ibid) that embraces personal knowledge might lead (Mellett, P., 2000, p.29).

The voices of the people in my life

Second, the voices of the people in my personal and professional life that have worked collaboratively with me, at times as co-researchers, provide evidence to substantiate my claims. I have known much pleasure in the development of the case studies¹⁷ of Cheryl, a teacher, and Greg, a principal, as I shared the stories with them as they were written. With each new version, we talked at length and their reflections and responses informed and enriched the next version. This collaborative and iterative process has deepened my understanding of my influence and my relationship with each of them and with others.

These stories, indeed this thesis, is the story, “restoried” (Connelly & Clandinin, 1999) many times in my life history, focused on these last six years, during the chaos created by economic rationalist policies. I recognize that “there is no one true story; there are many possible tellings” (Denzin, 1989; Mann, 1992 in Marshall, 1995). While they are my stories, I have endeavoured to include the voices of others that have influenced me, taught me and encouraged me to tell this story of my life as a superintendent, a story of a superintendent who is more than a “data gatherer” (Anderson & Jones, 2000). To bring the reader into an understanding of the nature of my world, I have described the context, the landscape (Connelly & Clandinin, 1999), in as much detail and with as much actual conversation as I felt necessary. I have included, as well, photographs of people and events that may help to fill in the colours of the landscape. The visual and the dialogic permeate the story. People and relationships are the focal point of this, my educational landscape. The connections and relationships supported by a culture of inquiry, reflection and scholarship are

¹⁷ See Chapter 2A.

essential to improving student learning, to the education of students. Herein lies my role as an educational leader.

Because of the dialogic nature of this study, critical friends and colleagues have played a significant role in testing and providing evidence to substantiate my claims to knowing. And, of course, Jack Whitehead stands, ever-vigilant, hand outreached, demanding, "What evidence do you have that anything you have done has helped any student, anywhere?" It may be that the 'plausibility' around that embodied knowing comes from the intense conversations in which I engage with Jack. It certainly includes conversations found in e-mails, transcriptions of audiotapes, reports, videotapes, CD-ROMs and performance reviews (Moffatt, 1995-2001a¹; Berry, 1995-1997; Quigg, 1998-2000; Mills, (2001).

The voices from the literature

The available academic literature in the field has both informed and denied my learning. What I mean by this is that it denies my learning in the sense that my learning is practical and dialogical. I find an inability in the propositional forms to explain my life and they appear to deny the experiential meanings in my practice. Where the literature has validated my epistemology, I have recognized that valued support and challenge. Where it has denied my practitioner's knowledge, " 'I' being conscious of having taken the decision to understand the world from his or her own point of view, as a person claiming originality and exercising personal judgement responsibly and with universal intent" (Polanyi 1957 in Mellett, P. 2000), I have confronted that challenge with my own way of knowing (Belenky et. al, 1997).

Many writers, researchers and thinkers have influenced my thinking and theorizing. Some, like Peter Moffatt, Jack Whitehead, Jean McNiff, Tony Ghaye and Sandra Webber and Claudia Mitchell influence me positively through direct dialogue, shared experience and relationship. Others, like Covey, Gilligan, Bateson, Clandinin &

¹ See pp. 476-491 in the Appendices.

Connelly and Winter influence me through their writing. Still others influence me because of a negative response to them in direct contact or through their writing. Because I disagree with them, some researchers have pushed me to examine my experiences and clarify my reasoning and values. I have integrated the literature that has influenced my research throughout the text of the thesis. As distinct from more traditional searches of the literature, which are given a separate chapter in a thesis, I have integrated the literature into the writing of my thesis demonstrating how it has influenced my thinking and learning. I can now acknowledge a comfort and pleasure in reading the academic research that was a nearly overwhelming challenge when I started in 1996. It hadn't occurred to me how far my understanding had come until I was teaching the Brock masters group in 1999-2000 and saw them struggling with articles that I took for granted and had integrated into my thinking. I was becoming a scholar.

How do I make sense of 'this' in this context (Mellett, 2000)? How can we account for how knowledge grows? I feel that I am "extending my cognitive range and concern" (Peters, 1966) through research-based professionalism (Whitehead, 1989) as I am researching my practical life as a superintendent and integrating the research in the field to inform my practice. In this thesis, I describe for the reader how I am influenced by ideas and how they become intimate to my practice; how I have engaged with the research and writing of others as they influenced my thinking and informed my practice; and how the conceptualizations and abstractions of others which are clearly different from my practice as a superintendent are needed in the scholarship of enquiry (Schön, 1995; Whitehead, 2000) for the superintendent. There have been powerful reflective phases in my life in which I have read the work, reflected on it, sometimes put it in my 'parking lot'¹⁹ and sometimes brought it into focus in a project or program. It is not all there at one point but part of a continuous learning process.

¹⁹ See earlier in this chapter.

When I started the research, I was lacking in confidence about my capacity to comprehend the research literature and experienced anxiety about engaging with the theorizing. That capacity has emerged in the research and in the construction of the thesis as I make public my knowledge through my standards of practice and judgment for which I hold myself accountable in my life as superintendent and which serve as standards to explicate my epistemology. Certainly part of my transformation in my leadership through research-based professionalism was as a result of the research of others.²⁰

What are the grounds of my claim to know? I feel that they are focused on my living standards of practice and judgment and the originality of mind that have come from my holistic way of moving forward while holding a vision of what's possible and connecting and integrating the various parts of the role. The ostensive definition of 'this' is the composite of the space and time where and when and why I am doing the learning. In the creative flow (Csikszentmihalyi, 1990) to my learning, the research of others is only influential as I creatively appropriate it with specific people in specific contexts and especially in dialogue with others. In this flow I am always engaged in moving forward in practice with an inquiring mind, engaging with conceptual ideas and then transferring them into my own practice.

External assessment

I hadn't given any thought to external assessment, meaning outside the board, until I listened to Geoff Mead (Mead, 2000) talk about an external study conducted to validate his accounts of his success in his police work. Then it occurred to me that Lynne Hannay conducted a study of the effectiveness of the OPSTF-School Boards action research project in the Brant Board and presented it at the Annual Conference of AERA in San Diego in 1999. (Hannay, 1999).²¹

²⁰ See Chapter 4.

²¹ See Chapter 3B.

In addition, when Fran Squire was Program Officer at the Ontario College of Teachers (OCT), she worked with Grand Erie staff on the validation and implementation of the OCT Standards of Practice (1998; 1999). In the reports that she made on her project, she clearly defined my influence on the teachers and administrators in the implementation of the standards and on the culture of inquiry and reflection (Squire, 1998, 1999). It is also evident in the work of Lori Barkans²² (Squire & Barkans, 1999), one of the members of pilot group in the Brant Board who became a member of the Standards of Practice Committee at the College of Teachers as a volunteer working with Fran who was on staff. Cheryl and I used the OCT Standards on ourselves²³; Fran worked with staff in both Brant and Grand Erie because:

Although there has been considerable attention in current educational literature to issues of theory and practice in action research, (Hollingsworth & Sockett, 1994; Cochrane-Smith & Lytle, 1993; Burnaford, Fisher & Hobson, 1996; Delong & Wideman, 1998) little has been written on the relationship of action research to the standards of practice for the profession. (The current work of Delong & Whitehead, 1999 and Delong & Black, 1999, has since added to our knowledge in this area) I wanted to see if action research could assist educators in planning their professional learning based on the standards of practice (Squire & Barkans, 1999, p.6).

This connection between the Standards of Practice for the Teaching Profession (OCT, 1998; 1999) Fran, Jack Whitehead's and my work runs through the thesis.

Established academic criteria

Using the term 'established' I recognize is courageous when I am aware of the paradigm wars and the healthy differences of opinion in the academy of what counts

²² See Chapter 3B & 4.

²³ See Chapter 3B.

as knowledge. Both Anderson and Herr (1999) and Connelly and Clandinin (1999) speak strongly of the need for dialogue on new criteria for establishing validity in practitioner research. Anderson and Herr's (1999) five tests for validity apply to my study:

1. *Outcome validity...is the extent to which the actions occur which lead to a resolution of the problem that led to the study.*
2. *Process validity asks to what extent problems are framed and solved in a manner that permits ongoing learning of the individual or system.*
3. *Democratic validity refers to the extent to which research is done in collaboration with all parties who have a stake in the problem under investigation.*
4. *Catalytic validity is "the degree to which the research process reorients, and energizes participants toward knowing reality in order to transform it" (Lather, 1986, p. 272)*
5. *Dialogic validity. In academic research the "goodness" of research is monitored through a form of peer review...(p. 16).*

On the much-debated subject of validity in practitioner research, I agree with the position of Connelly and Clandinin (1999) on narrative inquiry:

We think a variety of criteria, some appropriate to some circumstances and some to others, will eventually be the agreed-upon norm. It is currently the case that each inquirer must search for, and defend, the criteria that best apply to his or her work (p. 7).

While I do not expend much energy on the qualitative-quantitative debate, I do want to recognize that while much of my work is that of an individual influencing individuals, it is in a systems' perspective that I have much to contribute. I do not wish to engage in the paradigm wars but there are many warriors in the battles. In 1996 when Bob

Donmoyer was editor of Educational Researcher, and wondering how he was to operate in the midst of the paradigm wars, there was a series of papers arguing one side or another. In the midst of this were people like Eisner (1997) who encouraged alternative ways of representing data and research using the arts to more fully explain than the print could do.

Bob Donmoyer, Handel Wright, Patti Lather, and Cynthia Dillard revisited the paradigm wars in New Orleans AERA (Donmoyer, Dillard, Lather, 2000) in a session called "Paradigm Talk Revisited: How Else Might We Characterize The Proliferation of Research Perspect Within Our Field?" Amongst the four there was consensus that the prescription of the positivist approach and the quantitative paradigm no longer was the only means to acceptance but still questioned the nature of 'other' that is not of the dominant paradigm. Patti was proposing "a thousand tiny paradigms and a decolonizing methodology" and Cynthia wondered "how we evaluate multiple truths". Cynthia was "interested in thinking against yourself, in the shoe that does not quite fit and in research that is spiritually and intellectually moving". Donmoyer felt that "knowledge is contaminated and inevitably political"(Donmoyer et al, 2000). I found the session very helpful not only because of the thoughtfulness of the panel members but also because of being present and in the presence of people whose work I had read. Seeing them mattered to my understanding of my embodied knowledge. We need multiple ways of teaching, learning, assessing and researching so that we have "grounded criteria for determining validity from inside of them" (Lather in Donmoyer et al, 2000).

Much of the accepted academic knowledge on educational leadership is derived from studies *on* leaders. There appears to be a dearth of stories of the lives of systems leaders and in particular of those telling their own stories from within the system. Kushner (2000) says, "Educational policy is largely denied the insights of those whose research speaks of direct experience" (p. 206). And yet, I have frequently found myself reading the theoretical models such as Leithwood et al's (1999)

transformational leadership and trying to fit myself into it and as Paul Bredeson (1995) pointed out:

Another force influencing knowledge base examination in educational administration is the natural human inclination to seek order and rules to explain and to help deal with the complexities and paradoxes of practice in teaching and learning. The promise of specific rules of thumb, the right model and generally applicable laws of human behaviour, all of which inform professional practice, is very alluring. However, as Dewey noted, 'The final reality of educational science is not found in books, nor in experimental laboratories, nor in classrooms where it is taught but in the minds of those engaged in directing educational activities' " (32) (p. 50).

My values as standards of practice and judgment can be used as “grounded criteria” (Lather in Donmoyer, et al., 2000) to judge the validity of my living educational theory (Whitehead, 1989, 1993, 1999).

Public presentation and accountability

a) Validation Groups:

I have searched for and found a number of opportunities for presentation of my research at given points in time and in search of informed responses. I have taken advantage of times when groups of academics have been in Ontario together for presenting papers for feedback and response and they have been very accommodating. The most committed of these groups has been my validation group which was established at the time of my research proposal in 1996. It consisted originally of Dr. Tom Russell, Queen's University, Dr. Linda Grant, Manager of Standards of Practice, Ontario College of Teachers, Dr. Andre Dolbec, University of Quebec at Hull, Dr. Jean McNiff, University of West England, U.K., Dr. Ron Wideman, Nipissing

University, and Peter Moffatt, Director, Grand Erie District School Board. Dr Fran Squire, Project Manager, Ontario College of Teachers, Marg Couture, Executive Assistant ETFO, Darrell Reeder, Psychologist and Cheryl Black, Teacher and Vice-Principal, Grand Erie District School Board were added at later dates as willing volunteers.

“Issues of bias and distortion have been addressed by British researchers who have a longer tradition of engaging with problems associated with administrator research. Lomax, Woodward, and Parker (1996) establish the importance of validation meetings in which ongoing findings are defended before one or more “critical friends” who serve as a king of devil’s advocate” (Anderson & Jones, 2000). This validation process is clearly explicated by Michael Erben (1998a) in his reader on biography:

The validation of such research (in fact, of any research) is based upon the degree of consensus among those for whom the investigation is thought to be of interest and relevance. The descriptions, organization, conclusions and formulations represented in the research receive their validation by an experienced group of peers who regard the study as significant, worthwhile and in concert with its aims.

It is clear that one of the advantages of biographical research is that the variety that is the life of the subject will guide researchers against too rigid a view of methodology. As a number of methodologists have commented (e.g. Erickson, 1986); Woolcott, 1992) too concentrated a focus on research techniques can dull the understanding of the relationship between method and purpose of the investigation. The useful comment of Geertz’s that, ‘man is an animal suspended in webs of significance he himself has spun’ indicates the reciprocal, constitutive nature of object and subject (Geertz, 1973, p. 5). As such, the interpretive requirement is that the complex life-accounts of research subjects be studied, described and appreciated using as

varied a repertoire of investigative approaches as would any cultural texts (p. 4-5).



Validation Group, 1998:
Jack Whitehead, Peter
Moffatt, Fran Squire,
Cheryl Black, Ron
Wideman and Linda Grant.
Their responses to my
writing have been
incorporated into this work.

The Validation exercise occurred on three occasions. The first was held at the Act Reflect Revise Forum on February 27, 1997, when Jack convened my Validation Group to respond to "My Learnings Through Action Research." At the second meeting on December 3, 1998, I presented a paper, "Seeking An Understanding of Influence By Representing And Explaining My Life" to my Validation Group for reaction. The third validation group met on February 17, 2000 in Brantford at the Act Reflect Revise Conference IV to review my paper "My Epistemology of the Superintendency." At each meeting I noted suggestions for improvement and made amendments to my writing and thinking so that each time there was evidence of improvement. Each session was audio or videotaped and transcribed. And while the group did not meet formally, I shared my "My Living Educational Theory: My Standards of Practice/Standards of Judgment" (2001) paper to Cheryl Black, Jack Whitehead, Dr. Michael Manley-Casimir and the Brock-Grand Erie masters group²⁴ and received feedback that I have incorporated into this thesis. These papers are included in Part A of the Appendices.

In addition, for the July 27, 1998 Transfer Seminar I wrote a paper, made written responses to questions posed by Dr. Hugh Lauder, Chair of the Research Committee at

²⁴ See Chapter 3B.

Bath, met with the Head of Graduate Studies and presented an oral seminar to the University of Bath Research Committee.

b) Papers, Presentations and Conferences:

What I find in writing, publishing and presenting is that the process is itself a learning experience. When I prepare a presentation, write a paper or organize a conference, I have in mind what I want to cover and the processes I will use but I never know in advance exactly what will happen or how I will be transformed by it. These efforts have allowed me to construct, deconstruct and transform my thinking and learning and indeed my life as a superintendent. Some of the early pieces of writing, which I thought were quite wonderful at the time, now appear limited in understanding and product. I remember saying to Jack in December, 2000 when Action Research in Organizations (McNiff, 2000) was released that my thinking had moved so far from the work in my chapter “My Epistemology of the Superintendency”¹ which had been written almost a year earlier. Each of the papers and presentations has moved my thinking forward and I push myself to produce them so that I can test out my learning and make myself publicly accountable for my research and my work. Very often it is the responses from the audiences that have assisted me and because the sessions have usually been videotaped, I have had the opportunity to review the work and what transpired in the dynamic of the session and to use that dialectic to improve the next time.

I have debated many times whether the lists of my work are helpful for the reader to understand this thesis or just a “vulgar” (Bateson, 1980, p. 232) display of my work as an academic and practitioner. I have decided to fold them into the References so you can see the list but I think you will find that I have talked about these writings in the thesis.

¹ See pp. 370-383 of the Appendices.

Inherent in the debate in the academy on practitioner or insider research (Schön 1995, Anderson & Herr 1999, Anderson & Jones, 2000, Reihl et al, 2000), I believe, is the problem of researching and representing a life lived or “lived experience” (VanManen, 1990). The debate becomes even more complex and scattered when the process of self-study is incorporated. It seems to me that action research and self-study are used interchangeably in AERA, with action research being a term used in the UK and self-study more common in the USA. In addressing these issues in my research I have used a combination of self-study, narrative, life-history and visual representation through videotape and photographs to describe and explain my life over six tumultuous, challenging and exciting years as a superintendent.

In the appendices you will find some of the evidential base of my learning and improvement as well as more detailed clarification of events and processes involved in the role of superintendent in Ontario, Canada. In Part B with the organizational charts I have included a fact sheet on the Grand Erie District School Board and a map of its location. It is my hope that some of the reality of a superintendent’s life will be visible in both the theoretical and the practical aspects through this documentation.

Endpiece

In these final words I intend to give the readers the sense of being brought to an ending/answer so far and, consistent with the spiral nature of the action research process (McNiff, 1995), share some potential next steps. As Michael Bassey (1995) says in his “endpiece”,

...there are three ways to create education: playing hunches, repeating what has been done before and the third way: by creating education by asking questions and searching for evidence; ... by challenging and developing one's own personal theories of education by asking 'how do I improve my practice?' (p.139).

It seems fitting at this point to answer the question, “What have I learned?”

I have learned to create education (Bassey, 1995) and educational theory learning and sharing in collaboration with others. In this sense this thesis is our story, our education; it is a process in which my friends, family and professional colleagues have been partners and co-researchers. I have contributed to a *discipline of educational inquiry-“living educational theory”*, a *scholarship of inquiry* (Whitehead, 1999) and a new epistemology of scholarship (Schön, 1995). I am fortunate that I have escaped the feelings of failure so vividly described by Grant and Graue (1999) and Clark (1997) in that I have evidence that I have had an influence in improving education and have given voice to the practitioner-researchers in my school system. Having said that, I know that there is more to do.

I have learned to make a contribution to the academic and professional knowledge-base of education as a practitioner-scholar in the systematic way I transform my embodied educational values into educational standards of practice and judgement in the creation of my living educational theory (Whitehead, 1989, 1993, 1999). I have demonstrated how these values and standards can be used critically both to test the

validity of my knowledge-claims and to be a powerful motivator in my living educational inquiry. My values and standards are defined in terms of valuing the other in my professional practice, building a culture of inquiry, reflection and scholarship and creating knowledge. Understanding my values as standards of practice and judgment is disturbing and *fun* (Marshall, 1999).

I have learned that the process of building a culture of inquiry, reflection and scholarship involves changing policies, procedures and practices in my educational system as well as much personal commitment to a vision. But that it can be done - one individual at a time (Howey & Knill-Griesser, 2002). That change emerges in a *context of creativity* (Csikszentmihalyi, 2001, p.116-124), on broken fronts and, while overcoming obstacles and distractions, moves forward at a staggered pace. I have learned as well that it takes time – it is now seven years since the first group started in the Brant Board. Through contributing to building communities and networks, I have learned to encourage and provide sustained support for the creation of the *systematized knowledge* that Catherine Snow (2001) is searching to find (DeLong, 2001b).

I have learned that in the process of acting, reflecting, writing and sharing my learning in public fora, I found my own voice. When I examine my earlier writing (1996-2000), it is lacking the confidence and voice of the scholar that I have become. My writing, as part of my educative discourse, is one of the ways in which I give a form to my life. In forming my life, as a postmodern writer, I am working without rules in order to formulate the rule of what has already been done (Lyotard, 1986).

I have learned that that the professional development of each teacher rests in their own knowledge-creating capacities as they examine their own practice in helping their students to improve their learning. When teachers and administrators experience that capacity in themselves, it is transformatory and they feel that they are truly professional educators (Black, 2001; Christie, 2001; Davis, 2001; Dowds, 2001; Gath, 2001; Kline, 2001; Knill-Griesser, 2001; McDonald, K., 2001; McDonald, M., 2001; Ogilvie, 2001; Sallesky, 2001; Senko, 2001; Stewart, 2001; Suderman-Gladwell,

2001; White, 2001; DeLong, 2001b). That process of partnering with a university fulfilled what Anderson and Herr (1999) had in mind but the path was rocky and demanding. I will try again.

When Julie White presented her research (White, 2001b) to the twenty members of Planning Council on April 10, 2002, the group was mesmerized by her passion and confidence. She said,

Aside from being able to improve specific aspects of my practice through engagement in action research (student writing and math literacy), I have improved my ability to self-assess. This is probably the most valuable tool I have gained through this process. While writing this speech, I had the opportunity to further reflect on the claims that I made in my article on improving student writing in "Passion in Professional Practice" (DeLong, 2001b). I found that parts of my report could have used further evidence to support my claims. This come with experience, and the more I engage in the action research process, the better I feel I am getting at self-assessment (White, 2002).

That speech of Julie's was videotaped and will be part of a CD-ROM for professional development in Grand Erie. I am still learning new ways to support teachers and in 2002-2005, one of three goals that the program support staff in Grand Erie has planned is *to enhance the capacities of Grand Erie staff to conduct inquiry and make data-based decisions* (DeLong, 2002).

I have learned that the academic literature informs my thinking and practice when I am looking to validate my theorizing but for me there is no model of educational leadership (Stoll & Fink, 1996). I can answer my question through the mediation of my creativity and critical judgement in an appreciative engaged response (D'Arcy, 1998) with an idea. My inquiry, 'How do I improve what I am doing?' includes an

action research process where I integrate the narratives and theories of others into my evaluations and understandings of my own actions. I integrate the ideas of others into my understanding in an attempt to link the local with the global in an attempt to continuously overcome the limitations in what I might be missing. In the creative flow (Csikszentmihalyi, 1990) to my learning, the research of others is only influential as I creatively appropriate it with specific people in specific contexts and especially in dialogue with others. In this flow I am always engaged in moving forward in practice with an inquiring mind, engaging with conceptual ideas and then transferring them into my own practice.

I have learned that I have increased my influence by allowing people in my world to see how much I care for them and openly articulating my faith in their capacities. Part of that influence is as a female leader. I learned that my ontology is relational. My methodology, my epistemology, my ontology is very much dialogic, dialectic and collaborative. Most of my writing, research and daily practice is in collaboration, much like what Heron & Reason (1999) describe as *cooperative inquiry*. Like me, many of the *critical mass* (Moffatt, 2001) of teacher researchers in the Grand Erie District School Board and in the world have struggled to find a method of researching my practice that provided “methodological inventiveness” (Dadds & Hart, 2001). I see my heuristic relationship with the inquiries of Greg, Kim, Cheryl, Heather, Julie and Marion in relation to the community helping to enhance the value and validity of my own research and productive life in education. I experience a reciprocal relationship in my response to their ideas, values, and educational standards of judgment, thinking and research.

I have learned (contrary to some views of power and privilege (Noffke, 1997)), that I can use my power in positive ways to improve the capacity of systems to support teachers and administrators to improve learning for students. My value and standard of practice and judgment of valuing the other in professional practice has inspired others’ faith in themselves and encouraged them to research their practice in order to improve their lives and the lives of students. *You have had such a positive impact on my life... I*

mean both my professional life and my personal life. You helped me discover a part of myself that had been hidden until I did my action research project for my Masters (Kine, M., e-mail April 15th, 2002).



'Winter Breaker' by Ken Bolt, 1991, Studio Proof 1/1

I have learned that the image of the mammoth wave has helped me see the rhythm of my life and work. As

with the wave, my thesis has rolled and crashed and folded back on itself many times over and carries ideas forth and then back in a steady flow of creation (Csikszentmihalyi, 1990). At times the waves have come crashing down on me with a weight that I thought would drown me and at others have lifted me with a spiritual energy. As with the other photos in the thesis, it carries deep, varied and complex meanings for me.

These are interesting times in which to be an educational leader. I have matured personally and professionally, and am now able more to understand the importance of the research in which I am engaged. My research has helped me improve, be accountable for my actions, and 'shape a professional identity' (Connelly and Clandinin, 1999). I am fortunate to work with many talented and caring people – staff, students, parents and community members. The growing strength of the action research movement in my board and in the province and its capacity to improve student learning sustains my commitment to its potential. I believe that my research is contributing to the development of insider educational theory. I intend to encourage others to produce their accounts of practice to show how my influence has inspired them to exercise their influence in the lives of others for personal-social benefit. If our aim as educators is to create a world better than the one we currently live in through education, and if we feel we are in positions of influence to do so, we need to support the development of the kind of practical theory in action that will show our practices and also explain the justifications we give for what we are doing. For me, educational administration and leadership are educative, and I hope that I am contributing to a theory of education that will show that educational reality.

Iterative patterns of influence are evident throughout my story. I show how I was influenced by Jack, and how he encouraged me to discover and develop my potential for influence in the lives of those in my care. In turn, I have encouraged the people for whom I am responsible to do the same. In turn, we hope, the children who are the focus of the educational system will find the capacity themselves to become reflective and consider their responsibility in developing a social order in which their children will be happy to live.

I am hoping that my research has met Bassey's (1995) three prime indicators of quality: *adventurousness in the choice of topic, elegance in the process of enquiry, and worthwhileness of the product.* (p. 140). These are values I hold in my life as well as my work. At this point in the spring of 2002, I struggle with finding closure and with the balance and congruence between my methodology, ontology and epistemology. I know the path to improvement is never complete. So this represents merely a point along the way. A way I hope I have shared with integrity, elegance and grace.

I feel at ease with the pleasure, beauty and responsibility of my thesis, of the scholarship and contribution to educational knowledge. While I did it for me, to become a better person, I hope that it will be influential with others. I wish to give the last words to my daughter, Shannon:

I think the thing I love about my mom is that she's genuine in all that she does and in who she is and in who she wants me to be. The thing that struck me most when my mom and I were talking about her thesis was how animated she was about hoping her paper wouldn't just be good, or that it's a pretty great accomplishment but that it would be useful to education. That it could make her a better educator and be used as an instrument to help other interested educators also succeed in an area she deems important (Foerter, 1999).

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1. INTERNATIONAL ELECTRONIC JOURNAL FOR LEADERSHIP IN LEARNING

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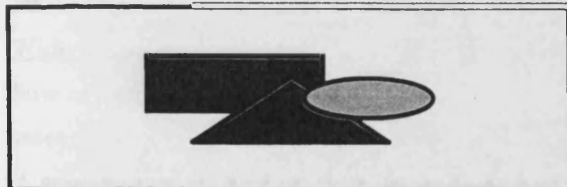
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What We Have Learned by Building a Collaborative Partnership

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Abstract

This paper contributes to the literature on why collaborative partnerships between schools and universities thrive or fail. It describes what we have learned through a successful collaborative partnership among the Brant County Board of Education, Nipissing University, and the Ontario Public School Teachers' Federation. The paper describes the constellation of factors that influenced the success of the partnership. We had a clear and compelling cause and a history of collaboration that pre-dated the partnership. Our relationship was based on shared values, purposes and collaborative skills that enabled us to resolve issues of power and voice. We were able to influence decision making in our organizations and they were able to cut through red tape to translate their commitment into effective action amidst a challenging provincial context.

Overview

In April, 1998, The Brant County Board of Education, Nipissing University, and the Ontario Public School Teachers' Federation (OPSTF) launched a new professional development resource kit entitled, Action Research: School Improvement Through Research-Based Professionalism (DeLong & Wideman, 1998b). The kit includes two books (DeLong & Wideman, 1998a; McNiff, 1998) and a video program (DeLong & Wideman, 1998c). We are proud of the partnership that produced this kit because we think it is symbolic of how collaboration by a school board, a university, and a teachers' federation can provide sustained support for research-based school improvement and professional growth.

A great deal has been written extolling the advantages of partnerships in education to address a wide range of issues from school improvement to teacher education. Far less has been written about why collaborative work involving schools and universities thrives or fails (Johnston & Kirschner, 1996). We agree with Johnston and Kirschner that general factors may be identified that influence success in partnerships. We also agree that there is no magic formula for success because each partnership is unique. It is through studying individual examples of partnership that general factors and their interrelationships may be identified.

Based on our experience, we think that a collaborative partnership is affected by a constellation of factors which, when combined, drive or impede the project (Senge, 1990). In this article, we discuss the constellation of factors that affected our partnership. While contextual factors are important to the success of partnerships and need to be studied further, the key factors in our experience are the trusting relationships among the project leaders (in this case, ourselves) and between the project leaders and their organizations. The former enabled us to build understanding and agreement and resolve issues important to the project. The latter affected our ability to influence our organizations to establish and support the partnership.

Background on the Three Organizations

Our project involved collaboration by three organizations with varying responsibilities for the education of children and for the professional growth of teachers. These organizations were able to sustain support for the project while two of the three underwent substantial changes themselves. During the project, provincial legislation was enacted to require the Brant County Board of Education to amalgamate with two neighbouring boards to become the Grand Erie District School Board. At the same time OPSTF was preparing to join with the Federation of Women Teachers' Associations of Ontario (FWTAO) to create the new Elementary Teachers' Federation of Ontario (ETFO).

The Brant County Board of Education employed 1,500 teachers and provided elementary and secondary education for approximately 17,000 students in 50 schools. The board was particularly proud of its work in parental and community involvement and had partnered with a variety of local organizations and businesses to enhance programs and services for students. OPSTF represented 13,000 statutory members, 30,000 occasional teachers, and 4,000 voluntary members. The organization had earned a well-deserved reputation for producing quality professional development activities and publications. Nipissing University, formerly a college of Laurentian University, received its charter in 1992. The Faculty of Education, which provides Bachelor of Education and Master of Education programs, has a continuous history dating back to 1909 and comprises about one third of the university's full-time enrollment each year.

Evaluating the Project

We developed the following four criteria for judging the success of our project:

1. **Timeliness of Response:** We engaged our organizations in the partnership quickly and produced the kit in a very short time - 15 months from the beginning of negotiations to the release of the finished product.
2. **Informal Agreements:** The project was established and operated on a relatively informal basis. Despite major changes in our organizations and the change of one of the project's leaders, collaboration was maintained and issues were resolved without setbacks.
3. **Acceptance of Products in the Field:** While it is early to assess the impact of the kit, there have been indications that it is considered a valuable resource. For example, Jack Whitehead, internationally recognized authority on action research at the University of Bath, U.K., has judged it unique in the world in assisting teachers to engage in action research. He has highlighted it on his widely-read action research homepage (<http://www.bath.ac.uk/~edsajw/>).
4. **New Collaborative Efforts:** Our organizations view the project as positive and valuable and are continuing under our leadership with a new venture - the development of a refereed electronic journal entitled the Ontario Action Researcher.

Because of work-related time pressures, we did not spend a great deal of time evaluating the partnership while we were producing the kit. The project was part-time and we were also performing our regular duties. We did keep journal notes but were most concerned with the action itself. Analysis of the project, therefore, has come about as a result of writing. Each time we have written articles, we have gone deeper into the analysis. We

began by reflecting individually on our own journal notes; we talked by teleconference, audio-taped the conversations, and transcribed the tapes; we wrote and re-wrote face-to-face and at a distance over the Internet; and we revised drafts based on suggestions by critical friends. The responses of the reviewers and theme issue editors of IEJLL to original drafts pushed us to further develop our understandings.

Our advice is to plan for the process of evaluation right at the start of any project despite pressures to save time by not doing so. Having learned (or is it relearned?) our lesson, we now understand that we need to include in the project plan a set of steps for collecting and analyzing data. While the evaluation should be planned, however, the plan must be flexible, individualized and self-regenerating. A checklist of fixed and formulaic steps would not have served us well, because it would not have captured the complexity of the partnership process.

Findings: Why Was Our Partnership Successful?

We have identified a constellation of six factors that worked together to influence the success of our partnership.

1. The project had a clear and compelling cause, action research.
2. A challenging provincial political context generated support for the project.
3. We had already developed a history of collaboration across federation, school system, and other organizational contexts.
4. Our relationship was based on shared values, purposes and collaborative skills.
5. We were able to influence decision making in our organizations.
6. Our organizations were able to translate commitment into effective action.

We will examine each of these factors in turn.

A Compelling Cause, Action Research

Our experience was in sharp contrast to the pain and frustration described by Noffke, Clark, Palmeri-Santiago, Sadler, and Shujaa (1996) as they tried to develop understanding and agreement among themselves about the focus of their partnership. We had a clear-cut purpose that we all agreed to be of worth. The compelling nature of this "cause" was shared by a network of professionals within and beyond our organizations who contributed in a variety of ways.

Action research is an approach to school improvement that honours teachers' professionalism. Individually, and in groups, teachers identify questions about their practice, make appropriate changes, and collect data to discover the impact of those changes. They record their studies and share the results of their investigations with others (Delong & Wideman, 1996; McNiff, 1998; McNiff, Lomax, & Whitehead, 1996; Whitehead, 1993).

Traditionally, teachers have accepted the predominant role of universities in educational research and the development of educational knowledge. Top-down change ignores the experience and voice of the teacher and has been shown to be largely ineffective in creating substantial changes in classroom practices (Fullan, 1982).

Action research is more consistent with Schon's (1983) model of Reflection in Action than with the model of

Technical Rationality that supports top-down change (Schon). Technical Rationality sees professional practice as instrumental problem solving and encourages a hierarchical relationship between the experts who develop knowledge and the practitioners who implement knowledge. Schon's work called the model of technical rationality into question. He found that in areas of uncertainty (and there are many in education), effective practitioners shift from instrumental problem solving to reflective practice. They become researchers who identify a problem, develop a hypothesis, and conduct an experiment to see how it changes the problematic situation. By pursuing cycles of action research, reflective practitioners develop new practices that are grounded in the reality of their own contexts.

The emphasis in action research on writing and sharing (DeLong & Wideman, 1996; McNiff, 1998; Whitehead, 1993), enables teachers to communicate the real changes in practice they have made and to contribute substantially to the development of the knowledge base of their own profession. From a hierarchical perspective this is a bottom-up approach to change. From a collaborative perspective, however, it suggests a more collegial relationship among schools and universities to honour what each brings to the development of educational knowledge.

The process of action research itself is conducive to the formation of collaborative partnerships particularly in its use of "critical friends" (Whitehead, 1993) to support the research process. Our partnership was also strengthened by a focus on action research and its capacity to build links among groups (Calhoun, 1994; MacTaggart, 1992). Action research mitigates against an attitude of individual ownership of a project to nurture, instead, a vision of learning and growing together. This shift from egocentricity to seeing oneself as part of a larger picture (Senge, 1990) can affect the ability of both individuals and organizations to contribute to the improvement of the social order (McNiff, 1992).

A Challenging Provincial Context

Cupertino (1996) recognized the impact of context on the accomplishments of a partnership project. A challenging provincial context generated support for our project. Many people recognized that action research could address widespread concerns emanating from the Ontario government's massive restructuring of elementary and secondary education. Successive governments had worked to establish curriculum expectations for students and to increase teachers' and school boards' accountability for achieving them. The accountability initiatives of the current provincial government include a standardized provincial report card, standardized provincial testing, and, through the Ontario College of Teachers (1998), the establishment of standards of professional practice.

While the government is identifying expected results of student learning, it is not dictating the means by which those results must be achieved by teachers and schools. Because students learn at different rates and in different ways and because Ontario is a large province with a diverse population, the decision making of teachers is essential for enabling children in individual classrooms to achieve expected results. Teachers and education officials are beginning to see professionalism and practitioner research as keys to improving the quality of student learning and accountability (Eames, 1995; Laidlaw, 1996). Action research is a vital means

of implementing this results-based approach to education and addressing the increasing demands for accountability by parents and community (Macbeth, McCreath, & Aitchison, 1995).

The economic rationalist policies of the current conservative government and policy reversals by successive governments have created an atmosphere of cynicism among Ontario educators. Teachers have begun to see action research as a positive way to deal with their own cynicism by taking charge of changes in their individual classrooms and by seeing whether those changes improve students' learning. Teachers create and share their own living educational theories as they research their own educational practices (Evans, 1995; Noffke & Stevenson, 1995; Whitehead, 1993).

Within the context of rapid change in Ontario education, enthusiasm for action research influenced a wide variety of people, both within and beyond our organizations, to volunteer to contribute to the project. For example, we were able to generate over six hours of videotaped interviews with elementary, secondary and university teachers to be used as the basis of the video program. A call for papers resulted in a rich array of research accounts and articles for the book. When we found that the kit needed clear and concise instructions on how to begin to conduct action research, Jackie approached Jean McNiff, an educational consultant from the U.K. Based on their pre-existing friendship and Jean's commitment to values and purposes we all shared, she generously donated her book, *Action Research for Professional Development: Concise Advice for New Action Researchers* (McNiff, 1998), for use in the kit.

A History of Collaboration

Kirschner, Dickinson, and Blosser (1996) recognized the need to devote considerable effort and time in school/university partnerships to relationship building. As individuals we had already developed a history of collaboration with one another across federation, school system and other organizational contexts. Consequently, we did not have to begin to develop trust and synergy at the same time we were initiating the project. We had learned that each of us consistently followed through on our commitments and that none of us played to the grandstand.

The collaborative relationship around action research began in 1994 with Jackie Delong, Ron Wideman, and Linda Grant, then an executive assistant at OPSTF. After Linda left OPSTF in February 1997 to take up new responsibilities with Ontario's new College of Teachers, Marg Couture continued the partnership for OPSTF. Linda and Marg were on staff together at OPSTF. Jackie knew Linda and Marg through OPSTF activities. Ron and Jackie had co-authored a number of articles on action research and had both contributed to the development of *The Common Curriculum: Policies and Outcomes, Grades 1 to 9* (1995), for the Ontario Ministry of Education and Training. (This policy document was the result of a six-year curriculum development initiative begun by previous Liberal Party and New Democratic Party governments. *The Common Curriculum* was repudiated after the Conservative Party gained power in June 1995 and has recently been replaced with a hastily developed curriculum that includes many specific technical expectations.)

As project leaders, we developed a strong working relationship during the Ontario Ministry of Education and Training Common Curriculum Implementation Fund Project that laid the groundwork for our action research collaboration. In early 1995, OPSTF received a grant from the Fund to investigate the use of new action

research to implement The Common Curriculum in Ontario schools. The project involved four boards of education. Teachers learned the skills of action research and conducted their own studies. By the time the Ministry funding ran out in December 1996, the project had produced the first "Act, Reflect, Revise" forum and a book (Halsall & Hossack, 1996) in which the teachers shared their research.

A Relationship Based on Shared Values, Purposes, and Collaborative Skills

Our collaborative relationship was based on shared values, purposes, and collaborative skills that enabled us to think compatibly and solve problems in ways that satisfied our individual and organizational needs (Christenson, Eldredge, Ibom, Johnston, & Thomas, 1996). As we worked together, discovering our common experiences helped us clarify the values and purposes we shared. We are all teachers by profession, with significant classroom and school experience. We have all been responsible for planning and leading professional development activities and have all made it a point to learn about and practice action research. We have a commitment to our own career-long professional growth. We have developed a capacity for risk taking and honouring multiple perspectives by serving in a variety of educational roles. These experiences helped us develop knowledge, skills and values that support collaboration.

As we worked together we found ourselves employing complementary interpersonal skills. For example, there were times during our partnership when Ron focused on how to complete the task at hand, Jackie connected the task at hand to other aspects of the project to create new possibilities, and Marg clarified and reinforced positively both kinds of contributions. Our shared values, purposes, and skills enabled us to know each others' priorities and the priorities of each of our organizations so that we could resolve issues readily. A key problem we faced was how to identify and address the different perspectives of teacher researchers and university researchers. Issues of power and knowledge (Foucault, 1979) related to these different perspectives kept surfacing (like the Loch Ness Monster, we joked) usually when one partner reacted to something said or written by someone else. As we talked the matter through, we agreed that the differing perspectives on research need not be in conflict. The development of collaborative relationships between teacher researchers and university researchers (Kirschner, Dickinson, & Blosser, 1996) can enhance the legitimate roles of both in the development of educational knowledge.

An Ability to Influence Decision Making

Block (1987) and Covey (1989, 1990) have written extensively about the importance of developing circles of influence and of seeing influence as a two-way process. We were able to influence decision making within our organizations in ways that enabled them to commit to the partnership with a minimum of formality. We could do this because we had developed trusting relationships within our organizations and because we took the needs and aspirations of our organizations into account in planning and carrying out the project.

In 1996, when the Common Curriculum Implementation Fund project funded by the Ministry came to an end, no further ministry funding was available due to changes in government policies. Because teachers had responded positively to the project and because action research had the potential to improve student learning, we believed that providing sustained support for action research was necessary and desirable. Under the

leadership of Jackie and Linda, the Brant County Board of Education and OPSTF agreed to cosponsor a second "Act, Reflect, Revise" forum in February 1997.

The current partnership was envisioned in December 1996 as we discussed the benefits of publishing the experience of the teachers who would be presenting at the upcoming forum. We became excited about the possibility of producing a professional development kit that would include print and video components. The video would put faces and voices to the names in the book and visually communicate teachers' enthusiasm. We decided to try to put together a partnership of our three organizations to provide resources for the project. Timelines were tight. There were only ten weeks until the forum. To make the project cost effective, it was essential to videotape interviews at the forum and to call for papers.

The positions we held gave us direct and immediate access to our chief executive officers. The Common Curriculum Implementation Fund Project had provided evidence of the power of action research to revitalize teachers and create positive changes in practice (Halsall & Hossack, 1996). We used this evidence to generate support. We shared the positive responses of teachers who had been using action research and communicated our conviction that action research had the potential to contribute powerfully to school improvement and teacher professionalism.

Within a month, we had obtained approvals to proceed. The partnership was truly a collaborative venture. It was initiated by all the partners together and was based on equity of purposes, contributions, and decision making. Funding limitations would have made it difficult for any of the partners to accomplish a project of this scale by themselves. There was a realization that the partnership would increase the breadth of support for the resulting kit and, therefore, the likelihood of widespread use.

An Ability to Translate Organizational Commitment into Effective Action

Senge (1990) and Bennis and Biederman (1997) have described the power that is accessed when organizations are able to focus their energies on clearly envisioned tasks. We were fortunate that our organizations were able to translate their commitment to the project into effective action. Following the February 1997 forum, there was a whirlwind of action to complete the project as soon as possible. We finished the video program by September 1997 and the book manuscript the next month. Editing, design, and layout began with the intention of releasing the kit at the December 1997 Conference of the Ontario Educational Research Council. However, political action by Ontario teachers in response to education policy changes by the provincial government delayed completion until March 1998.

We continued to enjoy the trust and strong support of our chief executive officers throughout the project. As a result, most of the arrangements among the organizations were made verbally and on the basis of trust. Bureaucratic procedures were minimized. Only two brief letters outlining general expectations for the goals of the project were required.

Our organizations accepted an emerging design that enabled us to complete the project while continuing our regular duties as staff. For example, Ron was assigned a practice teaching supervision route near Toronto that allowed him to attend project meetings in Brantford and Mississauga. Differentiated responsibilities that

emerged through mutual decision making were based on our own individual capabilities, the voluntary involvement of our organizational colleagues, and the available resources of our organizations.

The amount of development money provided by each partner was balanced by in-kind contributions. Jackie and Ron co-ordinated development of the book and video. Marg coordinated layout, design, packaging, and production. Staff in all three organizations contributed invaluable organizational and technical work. A Brant County firm donated the digitization of the video program. Technical and support staff at Nipissing University arranged teleconferences and supplied transcription services.

Conclusions

Based on our experience, we confirm the view that general factors can be identified which affect the success or failure of collaborative partnerships. We have come to think about such factors using the metaphor of "constellations" because it enables us to focus on how factors cluster and interrelate in individual cases to drive or impede particular projects (Senge, 1990). When a preponderance of factors interact to support the partnership, it will be more likely to thrive.

When phrased as questions, the constellation of factors we have identified may provide a framework for building and evaluating other partnerships. The questions we suggest follow:

1. To what extent is there a compelling cause to which project leaders and organizations can commit?
2. To what extent does the provincial/state/national context support the importance of the partnership for individuals and organizations?
3. To what extent has a positive or negative history of trust and collaboration been developed among the project leaders and between the project leaders and key administrators in their respective organizations prior to the establishment of the partnership?
4. To what extent do the project leaders share values, experience, and collaborative skills that can be used as a basis for developing understanding and agreement and resolving issues related to the project?
5. To what extent are the project leaders able to influence decision making within their organizations in ways that enable the organizations to support the project?
6. To what extent are the organizations able to translate their commitment to the project into effective action?

For us, a key factor is the trust relationship among the project leaders that enables them to identify and resolve issues that are critical to the success of the partnership. Our experience confirms the view that issues of power and voice are far more likely to be resolved positively within the context of strong collaborative relationships and that such relationships are also important in bridging the substantial cultural differences that exist between schools and universities.

While we confirm that building relationships must be the first priority in developing collaborative partnerships, we think that partnerships have an advantage when the project leaders have a history of collaboration that predates the project. The test for the partnership may lie in the time individuals will commit to building and maintaining trusting, synergistic relationships.

There is a need for further study of the importance of contextual factors in the success of partnerships. We think that there are at least two interrelated factors that need to be considered - the context external to the partnering organizations and the context internal to each of the partnering organizations. A supportive external context provides potential motivation for action by the partnering organizations. A supportive context within the organizations removes barriers to action, makes resources available, and nurtures the collaborative process.

Taking into account the contextual factors, partnership and powerful purpose are inextricably linked. Identification of a common cause, galvanized by contextual need and individual and organizational values, is a powerful motivator for productive action. When the common cause is elusive, however, there may be difficulty in generating the enthusiasm and support necessary to drive a partnership.

We believe that relationship is the key factor in bridging context and cause. Organizations should encourage staff to develop a wide range of collaborative relationships with staff in their own and related organizations and to use these contacts when partnership opportunities arise. The trusting relationships between the project leaders and key decision makers in the partnering organizations enables the organizations to provide effective support for a partnership. Interorganizational partnerships happen most effectively when the chief executive officers are in direct communication with the project leaders in the partnership and share commitment for the project.

Johnston and Kirschner (1996) indicated that collaborative partnerships require skills that many individuals do not possess. We agree that participants need knowledge, skills, and values that honour multiple perspectives and nurture trust, mutuality, and equity. We want to explore this more fully. There is a quality to collaborative partnerships that cannot be expressed in checklists and contracts. When you approach partnerships as you approach contract negotiation, the language shifts, the process changes, and the flexibility is lost.

Next Steps

Currently the Elementary Teachers' Federation of Ontario, the Grand Erie District School Board, and Nipissing University are embarking on a new cycle of partnership to develop an electronic, refereed journal entitled

The Ontario Action Researcher (<http://www.unipissing.ca/oar/oarHOMEPAGE/webhomepg.htm>).

The purpose of the journal, the first issue of which is expected early in 1999, will be to provide sustained support for teachers as they develop educational knowledge through action research. As leaders of the new project, we want to continue to develop our understanding of partnership as we improve our practice working together collaboratively.

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- Partnerships in Education
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2. HOW CAN I EXPLAIN THE NATURE OF MY EDUCATIVE INFLUENCE?
3RD INTERNATIONAL CONFERENCE OF THE SSTEP –
JULY 22-25, 2000

Jacqueline D. Delong
Superintendent of Schools
Grand Erie District School Board
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I want to begin by setting this paper in a framework of explanation, role and context.

My explanation

In explaining my practice, I draw on a range of literature and theory. I do find it helpful but insufficient to explain the complexity of my practice. Because I have never felt that someone else's conceptual framework can explain my life and learning, I find some comfort working in the context of *the loss of legitimizing metanarratives* (Lather, 2000). As Lyotard writes in his book on the postmodern condition:

A postmodern artist or writer is in the position of a philosopher: the text he writes, the work he produces are not in principle governed by pre-established rules, and they cannot be judged according to a determining judgement, by applying familiar categories to the text or to the work. Those rules and categories are what the work of art itself is looking for. The artist and the writer, then, are working without rules in order to formulate the rules of what will have been done. (Lyotard, p. 81, 1986)

In one sense I am such a postmodern writer. My writing, as part of my educative discourse, is one of the ways in which I give a form to my life. In this sense I see myself as an artist who is giving a form to her own life through her productive work. In forming my life, as a postmodern writer, I am working without rules in order to formulate the rule of what has already been done.

In another sense I am constrained and supported by rules. As a superintendent of schools, my 'system responsibilities' are full of rules. There are legislative rules governing everything from curriculum expectations to educational finance to health and safety in the workplace. I have a range of responsibilities set out by the Board and to which I am accountable in my annual performance appraisal with my Director. In working as a senior administrator and educational leader within a school board I accept that I work within a context governed by rules set by the Provincial Government and the democratically elected Trustees of the Grand Erie District School Board. Yet, because I view rules as guidelines, not barriers, I am also exercising my judgement and discretion in a range of contexts and in ways which enable me to see myself as a professional educator and knowledge-creator.

One of the problems in explaining my influence as a superintendent of schools, is to embrace the position of a postmodern writer. I want to do this while at the same time coming to understand the nature of the external forces. While I will draw on the traditional forms of theory with their analytic categories, I am thinking of doing this in a way which transcends their analytic categories in the creation of my own living theory (Whitehead, 2000) of my educative influence as a superintendent of schools.

What I want to do in my research is to find a way of clarifying and communicating my living standards of professional practice. These constitute the explanatory power of my living theories. I want to do this in a way which shows that these living standards of practice are also the living standards of judgement I use in testing the validity of my claims to know my educative influence. In the way Geoff Suderman-Gladwell (<http://bath.ac.uk/~edsajw/brgeoff.mov>) talks about the criteria for judgement emerging from his students' practices in dialogue with him, so I want my own living standards of practice and judgement to emerge in the course of telling my story of my life as a superintendent of schools. What I want to do is to clarify and communicate my living standards of practice in the course of their emergence in my practice. This brief paper is an example of how I intend to do this from within the complexity and range of activities which constitute my working life as a superintendent.

My role and context

For the past five and half years I have held the position of superintendent of schools, in a large school board in southern Ontario, Canada. I have responsibility for 11 elementary schools in 14 buildings and five secondary schools, one of which is a medium security prison. In addition, currently I have a number of system portfolios which include:

1. Assessment, Evaluation and Reporting,
2. Community Relations and Career Education,
3. Staff Development,
4. Leadership, and
5. Communications.

Representing this complexity and that landscape (Connelly & Clandinin, 1999) in a way that communicates that living story of my life as a superintendent is problematic. However, the focus of this paper is not to deal with all the complexities of the job but to emphasize the standards of practice which can help to explain my influence.

My holistic standards of practice as a superintendent

After continuous reflection and examination over five years "shaping a professional identity" (Connelly & Clandinin, 1999) of my life as a superintendent, I am beginning to see recurring patterns and images. First I am always, no matter the position or situation, focused on teaching and learning. Second, the most vivid images are of the people and the relationships I have developed and sustained over time. When my mind works through a direction or problem it starts with the faces of people involved as they exist for me in context and then infuses the ideas into the process. The third factor that contributes to the way I do things is that I retain a prevailing vision, a vision of good, of what the strategic direction or significant outcome will look like and retain that as a focus amidst the struggle and conflict. In fact, one of my capacities is to lift myself emotionally and intellectually above the fracas to retain that image of a better future. (Fletcher & Childs, 2000) For example, my extended paper will examine the restructuring of the school board in 1998.

It seems to me that I begin with a vision that is linked inextricably to the images of the people associated with the idea. That occurs simultaneously. The images of the people and the long term outcome wave in and out as a picture forms from the movement and integration of the ideas and the people similar to the way that watercolour works. A form emerges from the interaction of the paint, water, brush and paper. The original vision frequently alters and sometimes changes completely as a result of dialogue, reading and reflection.

Like painting canvases, I work on several plans at the same time in various stages of completion. Ideas move forward on a broken front with me working at each of them at different times, in different ways and to greater or lesser degrees of attention, concentration and time. Sometimes external pressures force my attention to a particular project because of issues like safety, budget, deadlines, timelines and government or board dictates. Mostly the pressures come from within as moral imperatives. I have a need to act, to see something get better. I find my work is very much an integrated whole based on my values and the people with whom I work. The integration provides the means to accomplish several tasks at the same time with relatively greater speed and effectiveness.

Given these three, then I draw out the constellation of connections that will bring the vision to fruition. Mostly the connections are amongst the network of people with whom I have built relationships over time but they also include resources, political "nous" and policy direction. I will then begin to bring together the people that can make the particular direction/event happen, develop the policy or procedure and gather the resources required. I move on all these fronts simultaneously moving the processes forward. Even in very bad times and often despite terrible setbacks, I keep moving forward. I respect the past, but I find I am very much "present" in my dealings with people and my enjoyment of events as I am planning for improvement and a better future (McNiff, 1992).

Other living standards of practice I use to explain my influence as a superintendent and professional educator

Having described the way I see my influence and I want to return to this holistic view as a living standard of practice, I now want to explain my influence using my other living

standards of practice. In my explanation I am using Lather's notion of ironic validity (Donmoyer, 1996) as I seek to communicate the living standards of practice which are embodied in my practice. I know that my communications of my standards is a representation of the standards, rather than the direct apprehension of these standards as they are lived in my practice.

I want to move you to a shared understanding of my standards, through my words, to the images of the people I work with, and to the meanings of my living relationships through which my influence is felt and understood. Because of limitations of space and the complexity of my work I will bear in mind a point made by Gerald Manley-Hopkins - I do not give a fig for simplicity this side of complexity, but I would die for simplicity on the other side of complexity!

So, here is my attempt to represent four of my living standards of practice in an explanation of my influence as a superintendent. The first is a motivating pleasure, a *life-affirming energy* (Bataille, 1987), which I believe is at the heart of my influence and my first standard of practice. When I first began working with teachers conducting action research *the one indicator I was looking for and clearly saw was an excitement, a fire, a light in their faces that told me that the energy, motivation, and commitment was there to be tapped.* (DeLong, 1997) (see the images included in this paper at <http://www.bath.ac.uk/~edsajw/values/delong.doc>)

The second standard of practice concerns teaching and learning. I believe that I communicate to those I work with a passionate interest in their learning as they work in ways which are intended to improve the quality of students' learning. I am focusing on evidence which can be used to judge the influence of the teachers on helping students to improve their learning. The teachers' accounts are available on the website of the Ontario Action Researcher (<http://www.unipissing.ca/oar>) .

The third standard of practice concerns the critical judgements I make as part of the process of responding to and improving the quality of teachers' professional growth. Here are the kind of critical judgements I make when I visit classrooms.

In reflecting back on the visit to Geoff Suderman-Gladwell's classroom, I tried to analyze my enjoyment. I could see from performance indicators stored somewhere in my head that good practice was in operation here. Performance indicators include such factors as students actively engaged in and discussing their learning, authentic performance assessment through practical application of learning, teacher actively guiding learning not the sage at the front, a caring and respectful environment for learning, eagerness to share learning on the part of students and teacher, and so on. My enjoyment rested in both the special relationship that I have with Geoff and the critical judgment I can exercise to assess good work when I see it. Here was good work.

The fourth standard of practice concerns my tenacious and creative response to working in a set of power relations. In the extended paper on the CD-Rom of the conference papers, I analyse these power relations in terms of my experience of the restructuring of School Boards in Ontario, when it looked as if my Superintendent's post might be deleted!

Perhaps one of the clearest expressions of my influence in which these four standards of practice can be seen is in Jack Whitehead's response to Geoff Suderman-Gladwell at a Master's session on the 13 May 2000.

Jack Whitehead's response <http://www.bath.ac.uk/~edsajw/brgeoff.mov>
to
Geoff Suderman Gladwell <http://www.bath.ac.uk/~edajw/jwgsg.mov>

Both Geoff and Jack are expressing the four standards of practice I have identified above. I brought them together through my influence in establishing the master's programme and in encouraging Brock to invite Jack to participate in the programme as a visiting professor. I see both Geoff and Jack expressing the above standards in their own terms in their practices as professional educators. What I think distinguishes my own standards of practice as a superintendent is that I both express these standards as a professional educator and exercise my influence as a superintendent. I have attempted to communicate this distinguishing standard of practice of a superintendent in the holistic form of my description above on 'how do I influence others'. (Black & Delong, 1999) In saying that this is my fifth standard

of practice, I do not want it to be taken as part of a list of linguistic standards. I want it be seen as a holistic living standard within which the other standards make sense to me as I seek to sustain and extend my educative influence as a superintendent of schools.

There is much evidence that the written word cannot capture the nature of my influence and therefore much of the real message is lost without the visual images that can be captured on video and multi-media. For that reason, I am supporting professional educators to use those media to develop and share their knowledge. In the visual images we can see the generative and transformative quality of the discourse which enables the creation of the knowledge that is the life and learning of teachers and administrators. Nevertheless, this paper contains a linguistic representation of parts of my life as a superintendent as I attempt to enable others to free themselves from constraints on their creativity and life-affirming energy (Bataille, 1987) and to create their own epistemologies of their lives as teachers and administrators. In conclusion, I'd like to ask for your help through your creative and critical responses in making sense of my life as I hold on to my sense of being a creative knowledge-producer and practitioner.

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5. MY EPISTEMOLOGY OF PRACTICE OF THE SUPERINTENDENCY

(IN ACTION RESEARCH IN ORGANIZATIONS, McNIFF , 2000)

Jackie Delong

Introduction

In this chapter I would like to describe and explain the nature of my influence as an educational leader in a school district of over 32,000 students. The chapter is set in the context of paradigm proliferation (Lather, 2000) and new epistemologies of scholarship and practice (Boyer, 1990; Schön, 1995) at the beginning of the new millennium. There is much evidence that the written word cannot capture the nature of that influence and therefore much of the real message is lost without the visual images that can be captured on video and multi-media. For that reason, I am supporting professional educators to use those media to develop and share their knowledge. In the visual images we can see the generative and transformative quality of the discourse which enables the creation of the knowledge that is the life and learning of teachers and administrators.

Nevertheless, this chapter contains a linguistic representation of my life as a superintendent over a span of five and a half years in terms of my learning and growth. Much of that growth has come about through a self-discovery of freedom which I found through breaking

out of the controls exerted in family and professional relationships. This freedom has been expressed in my subsequent desire to enable others to free themselves from constraints on their creativity and life-affirming energy (Bataille, 1987).

My current situation

I have worked since 1995 as a superintendent of schools in a Southern Ontario school board in Southern Ontario, Canada. These years in the post have seen significant changes in administrative and organisational structures throughout the education system. An issue which has had particular significance for my work has been the amalgamation of boards to ensure the effective implementation of rationalist economic policies, a move which has resulted in substantial chaos for teachers, administrators and other personnel. Living through the chaos has been a difficult but valuable learning experience.

During those same years I have also been conducting action research into my own practice as a superintendent, collecting and analysing data, writing about what I was learning, and encouraging others to do the same. The work and research have rolled in and out and have often mixed together in the formation of waves, sometimes creating images of great strength and beauty, and sometimes of trauma and pain.

I want here to tell the story of how I have developed my own epistemology of practice of the superintendency. I hope to show how my epistemology is rooted in strong and caring relationships, and how I have enabled people to learn, and value their own learning. I believe I have enabled people to develop their own epistemologies of practice, so that they are able to reflect on their action and show how they have improved the quality of education for themselves and others.

To show that and how I have done this is of particular importance for me. I recall an episode at the 1996 American Educational Research Association annual meeting. Key members of the newly formed Special Interest Group on Self-Study were gathered in the lobby. I joined the conversation, and in response to a question about what I intended to

research, said that I hoped to research my practice and demonstrate improved educational leadership. I hoped to demonstrate this in terms of how the quality of my influence impacted on principals, teachers, and student learning. A colleague wished me luck because, evidently, to date no one has been able to do that satisfactorily. I took from the comment that the distance from my position as superintendent to the classroom was perceived as too great to demonstrate any line of influence. Showing the connection wouldn't be a simple matter, I thought, but it would be worth the effort.

The reservations of this colleague are well borne out in the invited paper to Division A (Administration) by David Clark, a Professor at the University of North Carolina, at the 1997 AERA conference, when he talked about his terrible disappointment in his and the academy's inability to capture the essence of educational leadership:

The honest fact is that the total contribution of Division A of AERA to the development of the empirical and theoretical knowledge base of administration and policy development is so miniscule that if all of us had devoted our professional careers to teaching and service, we would hardly have been missed.

(Clark, 1997)

He went on to challenge the academic community to create a new field, 'the sociology of the interesting', and to focus more on practitioner-leaders and less on publishing research papers; for it is in practice that real social change takes place, and practitioner-leaders are key agents in the process.

I took from this comment that Clark felt that there was ample propositional advice about what educational leadership might look like, but little research-based evidence to show its realisation in practice. This helped me to firm up my own resolve to theorise my own practice as an educational leader; part of my research would be to produce validated evidence that I had beneficially influenced the quality of learning for people at all levels of the educational system.

This, then, became my research project for my doctoral studies, beginning in 1996, and about to conclude, I hope, in 2000.

What does a superintendent of schools do?

There are two facets to the position of the superintendent in my board: one is the responsibility for a family of schools, and the other is a number of system portfolios. System portfolios refer to broad frameworks of educational activity, and include the implementation of policies and procedures. The portfolios for which I had responsibility on my appointment in 1995 were School-Work-Community, Staff Development, Safe Schools, Compensatory Education, and Career Education; today they are Assessment, Evaluation and Reporting, Staff Development and Leadership, Community Relations and Career Education. My family of schools in 1995 in the former Brant County area was the Pauline Johnson Family of Schools – 14 elementary and secondary schools, and about 5,000 students. Today it is the former Norfolk area: Delhi, Simcoe, Valley Heights, and GELA (Grand Erie Learning Alternatives) and the supervision of the Simcoe School Support Office and its principal-leader. The work is demanding, and over the years I have come to realise that the driving force that sustains me throughout is my vision of a school system whose purpose it is to improve student learning.

This vision of improving student learning places my own understanding of my work in a different plane from the traditional literature on educational leadership, which emphasises the functional and task-oriented nature of the work. I do not subscribe to this view. I engage more readily with the writings of authors such as Stephen Covey, who challenges the dominant theme in the success literature as ‘one filled with social image consciousness, techniques and quick fixes’, and proposes a return to the ‘Character Ethic as the foundation of success – things like integrity, humility, fidelity, temperance, courage, justice, patience, industry, simplicity, modesty and the Golden Rule’ (Covey, 1989: 18). These values are the ones that inform my work, and I systematically find ways to let them transform into educative practices throughout aspects of the system where I am able to have an influence.

What was the nature of my research?

At the same time as I was beginning my new job, I was also learning about and supporting action research processes through a pilot project that I had initiated with Linda Grant, the then Executive Assistant with the Ontario Public School Teachers' Federation. By 1996 I was coming to the conclusion that I was supporting teachers in doing their action research, but not doing it myself. Here was I, one who took pride in saying that she never asked anyone to do anything that she wasn't willing to do herself, experiencing myself as a living contradiction (Whitehead, 1989) in that I was saying one thing and doing another. The situation changed when I lunched with Tom Russell, Professor at Queen's University, Ontario, and Jack Whitehead at the first 'Act, Reflect, Revise' Conference (convened by the Ontario Public Schools Teachers Federation in February). Tom and Jack convinced me that I actually had something worthy of researching and writing in my life as a senior woman manager (which still comes as a surprise to me). Tom talked about my capacity to speak with the authority of experience (Russell, 1995), and Jack was interested in taking me on as a student. I was excited about doing advanced research that was practical in nature and gaining accreditation for the work of improving myself and trying to become a better leader for my school system.

What I think my research has come to demonstrate is how I hold together many different activities, relationships and influences, and continue to address powerful politically-driven influences in the education system in directions which enable me to continue to exert my educational leadership in ways that I value. These ways primarily involve understanding the quality of my relationships with other people, and how I can influence those relationships so that they lead to learning. Understanding the nature of my educative relationships has become the focus of my research. Throughout my practice I concentrate on ensuring that the quality of relationships is educative in the sense that I support people to make their own decisions, become autonomous, and act in ways that will ensure student learning.

Given the diverse nature of my job, my relationships are also many and varied. My work involves working with senior administrators and trustees at Board level, principals, vice-principals, teachers, teacher unions, parents, students, business, industry and university personnel. I believe that being an effective leader involves creating, developing and

sustaining positive relationships built on trust and respect. A relationship of this kind is earned and requires time together. Whitehead (1993) speaks about extending educational enquiry from a personal to a social orientation so that 'educational theory is a form of dialogue which has profound implications for the future of humanity' (Kilpatrick, 1951). McNiff *et al.* (1992) see action research as a means to improve the social order. How could I do this? How could I show that my work did exist as a form of dialogue with profound implications for the future of humanity, and did contribute to a good social order? While I recognise that improving the social order is not a small task, I firmly believe that it is attainable in small ways by each one of us, and is certainly one of my purposes in my sphere of influence (Covey, 1990). How could I show that I was attaining my vision? This became a driving factor as my research began to develop.

More changes

In 1996–1997 it became apparent that the new Progressive Conservative government was going to shake up the school system. As the new Minister of Education said early in his tenure, it was time to 'create a crisis' in order to bring about change in education. In addition to reducing the power of the teacher unions and trustees, the government intended to create a new curriculum, test students provincially, change the funding policy, reduce the power of school boards, and increase the size of school boards. This caused unprecedented upheaval among the workforce, and I found myself wondering how I could continue to support practitioners to maintain their morale and commitment to education. While what was happening in Ontario was part of the wider economic rationalist policies evident in the UK, US and New Zealand, my concern still was how to support people at the local level. I still saw the development of personal relationships as the key to challenging wider global trends through a personal commitment to practice; but those relationships were in danger of erosion because of the enormous significance that external political and economic factors were exerting on people's lives.

With this in mind, I began to concentrate on supporting communities of practitioner researchers, and systematically to build up networks of support. I began to work with the

principals in my family of schools to create a 'collaborative community of learners and to move them from dependence to independence to interdependence' (Covey, 1990). I began to work with curriculum support members of staff; and also to work systematically to enhance relationships with community, business and industry groups to create partnerships. I aimed to involve staff and community in creating the new board. In the former Brant Board I seen the potential of building partnerships for the purpose of 'enhancing programs and services for students' (DeLong and Moffatt, 1996). I wanted, through my efforts to develop educational communities, to provide a counterbalance to the worst effects of technical rationalist policies which were driven by anything but educational values.

I concentrated on developing programs of staff development. This included the planning and implementation of professional development programmes for teaching and non-teaching staff, and program implementation. Action research was part of the staff development model that I created, and during this time I initiated an action research pilot project with Linda Grant and four other boards with five teachers and two school administrators. This initiative in turn led to publications (DeLong and Wideman, 1996, 1998), presentations at the Ontario Education Research Council, and presentations on a wider front, including the American Educational Research Association annual meetings.

Developing the research

As I was learning the job of school superintendent I was consistently documenting my actions and reflections through taping and transcription of meetings and workshops, daily journal-keeping, photos, evaluations of my practice by my family of schools' principals and the director and submitting my writing to public scrutiny for response. This was hard work, for I never perceived myself as an academic, and have felt somewhat intimidated by the academic community. This however did not deter me. I spent time during the summers of 1996–1998 working with Jack, my supervisor, in Bath, UK, and I developed my range and understanding of issues in educational research. As time progressed, the focus of my research began to emerge as being an investigation of my life as a superintendent for the purpose of contributing to the knowledge base on educational leadership. I also developed

my understanding that it was not sufficient to produce only abstract accounts about leadership, as Clark says (see above). To stay true to the exciting ideas of the new scholarship (Schön, 1995), I would have to show how I was generating my own theory from within my practice, and also explain how I was generating circles of influence that would show leadership as a lived practice that had profound implications for other people's lives.

The political backdrop continued unfolding into new stories of disaffection and dismay. During the fall of 1998 there was persistent conflict between the teacher federations and the government culminating in a two-week strike of all teachers and most school administrators. A six-month term was lost to coping with the unrest and anger. The economic rationalist policies were implemented in all their realities in Ontario. Funding was slashed from anything that didn't produce and make a profit.

September 1997 saw the beginning of the preparation for the amalgamation process, with widespread structural change and re-allocation of administrative responsibilities. The government had mandated the merging of boards, none of which wanted the merger, and some put up considerable resistance. It was my job to help steer the whole process through, in spite of my own opposition to the changes that were taking place. I tend to embrace change where I see an opportunity for improvement, but I could discern none such here. However, I was still driven by my concern to maintain the quality of educational experience for students, teachers and other partners in the education system, so I directed increased efforts to trying to make the best of what I saw as a potentially disastrous situation.

The process of amalgamation was disruptive for all and characterised by an atmosphere of anger, fear and imminent disruption. Because one of the government's intentions in amalgamating boards was cost cutting by downsizing senior administration, my own job came under threat, as well as those of many of my colleagues. The crisis had been well and truly created. Early retirement was offered to both teachers and administrators close to retirement but the drain on leadership ranks, particularly principals, grew into a crisis situation as the numbers leaving increased. It was my task to solve the problem within my Leadership portfolio.

So how did I maintain my enthusiasm for my research in light of these massive structural changes with their implications of personal instability and closure? My response to the crisis was to maintain my commitment to providing a quality educational experience for students. I saw opportunities to use my influence to combat the external disruption by concentrating on building up confidence in action research approaches to professional development, and disseminating work to show its usefulness. We renewed a partnership with the now amalgamated Elementary Teachers' Federation of Ontario, Nipissing University and the new Grand Erie District School Board. Colleagues and I developed the *Ontario Action Researcher*, an electronic journal, of which Ron Wideman, Assistant Professor at Nipissing, and I became the editors. Our first issue was in December 1998. In the *International Electronic Journal for Leadership in Learning*, we describe how the quality of our relationship and trust of each other has supported us in finding opportunities for new development.

I was interested at the 1998 AERA meeting in San Diego to listen to a presentation at the Special Interest Group on the Superintendency which suggested that superintendents were interested only in power and money and not at all interested in children and learning. The presentations at this symposium were given by academics who spoke about the role of the superintendent, in a predominantly negative way. I was angered by the distortion of my reality, and suggested that the presenters might want to reconsider their conclusions. My comments were endorsed by other superintendents at the session.

The experience brought home to me the importance of generating public theories of the superintendency. Contemporary influential research is noting consistently the need for the creation of insider, practitioner, design inquiry research and the need for new policies and legitimisation from the universities for this approach (Anderson and Herr, 1999; Boyer, 1990; Clark, 1997; Donmoyer, 1996; Schön, 1995; Zeichner, 1995). It became evident to me that I was fortunately positioned in that I was able to show how I was influencing the quality of education for students through my practice as a superintendent. The generation of

my own theory became a moral imperative of essential import in the development of new theories of leadership which would have implications for good social orders.

Moving on in the research

I successfully transferred to PhD study in 1998, and now focused on generating evidence to support my claim that I have positively influenced the quality of education for people at all levels of the education system. The evidence I produce comes from a variety of sources. I can show for example how I have worked with Diane Morgan, Program Coordinator, in the Pauline Johnson Family of Schools, such that she and I have increased our knowledge about testing and ways to use the process and data in the tests themselves and in the results to improve student learning (DeLong and Morgan, 1998). I can show that my involvement with the Principals' group inspired them to monitor their practice such that they influenced positively the quality of educational experience for the teachers and students in their schools (DeLong, in press). Evidence exists of how I have supported other administrators to help those for whom they are responsible, so that the same circles of influence are evident in their dealings with people at grass roots level (Black and Rasokas, 2000; Knill-Griesser, 2000; Mills, 1999).

If I had to choose one episode that captures how I believe I have influenced the quality of educational experience for others on a wide range of fronts, I would cite my work with Cheryl Black. We tell of our work in our papers for the International Conference on Teacher Research (Black and DeLong, 1999, 2000). In the papers we deal with the concept of influence, and I will explain shortly what is of particular significance in our work for the idea of developing communities of reflective practitioners through action research.

My epistemology of educational leadership

During the summer of 1999 I began synthesising my research as my thesis. This would be the public presentation of my theory of leadership, as I understand it in relation to the people I support. I think it is worth spelling out here what that entails.

When I read traditional texts on educational leadership, I encounter a domain of propositional ideas. I read about what leaders should do, and how they might possibly achieve the recommendations. This is the situation which Clark lamented (see above).

Now let me tell you of the reality of my own practice.

In the 1998–1999 school year, I accomplished the following:

- visited all 21 schools in my family of schools at least three times and some many more times;
- created a new family of schools meeting structure with a Professional Development planning committee responsible for the staff development part of the agenda and reviewed it twice;
- set expectations in place for the school support centre;
- developed and implemented an 8-facet Leadership program;
- developed a partnership with Brock University to pilot an on-site MEd course;
- trained new support staff;
- developed and implemented processes for the provincial assessments, new report cards and enhanced assessment strategies;
- expanded the Career Education Centres and other partnerships into the new areas of the board;
- developed new leaders and expanded the action research networks across the board;
- reviewed and implemented elementary and secondary curriculum;
- extended the corporate side of staff development;
- conducted a secondary school accommodation (school closing) study.

On the face of it, I am of course busy, creating new opportunities, sustaining initiatives, conducting my work in an efficient and effective manner. Describing my work in this objective way, however, does not communicate what makes my work successful, or why I believe I am justified in calling it educative. In order to communicate the value of my work in terms of how I understand my educative influence, I need to theorise my practice as a

leader in a way that shows how the work is educationally influential. For this, I have to explain the criteria and standards of judgement I use to judge the quality of my work.

The criteria I choose for my work

I identify as a major criterion for judging the quality of my work the issue that I need to show how the work is having impact in all the contexts of education where I am active. In the list above, can I be reasonably sure that all these contexts are educative? Can I be sure that the quality of education is as active in the formal contexts of developing an MEd program as it is in my informal interactions with colleagues in the family of schools? This overarching criterion embeds a set of other criteria. How can I be sure that my own commitment to educative relationships is apparent in the practices of other people? Have they learnt from me? Have I communicated to all persons with whom I am in contact what I have learnt to be necessary in educational leadership? Given the diversity and wide range of my own activity, how can I be sure that my influence is felt in all the contexts of my professional life?

At a practical level, the criteria I have identified manifest as issues of care and support. Do the people with whom I come into contact feel that their lives are enriched because of our interaction? Do we feel sufficiently confident within our own relationships that we can take responsibility for our own learning and encourage others to do the same?

My standards of judgement

I judge the quality of my work and influence in terms of the values which drive my life. At the heart of my seemingly multitudinous tasks remains intact the sanctity of personal relationship. I believe that it is in nurturing people, in caring about them in a way that they feel valued and honoured, that I can help them to become autonomous and strive to realise the educative potential within themselves. In all my dealings with people, regardless of their rank, context, or position, I approach them with respect, regarding them as my equals and capable of generating their own creative responses. I have learnt the importance of not speaking on behalf of others; I encourage and support them to speak for themselves. I judge the quality of my work in terms of whether I live these values in my encounters with all people in all my contexts – am I the same person in an encounter with a vulnerable person

such as a student as I am in an encounter with a powerful person such as a senior administrator? Do I bring the same values of respect and honour to all my encounters?

Further, by consistently living my values in my work and never accepting any slippage between my values and my practice, am I able to influence other people to do the same? Do I live out what I say I believe? Can I show the integrated nature of my theory and practice so that the way I live manifests as a personal educational theory that potentially has influence in the lives of others for personal-social development?

Evidence

I have identified a base-line for myself in this regard. I believe that if I can show that one child benefited from one teacher, and that I can trace the quality of the relationship between the child and teacher to my influence, I can begin to think that yes, I am having an influence. Such an opportunity presented itself.

In December 1999 a delegation of three Japanese professors visited with me to learn from my experience in implementing action research in a school system. I wanted to give them a complete view of the work I am doing, and I provided a number of opportunities for them to hear the voices of the teachers and students working together. It was at a session with Cheryl's students that the evidence emerged which my colleague had challenged me to find four years ago.

Cheryl's students talked with her about their involvement in her research on her teaching practice, and their growing capacities to inquire about and reflect on their learning. Several of the students commented that they felt they were learning better because Cheryl was giving them opportunities to think critically, to speak on their own behalf, to create and voice their own ideas without anxiety, to feel valued, to believe that their contributions were worthwhile. The conversation was taperecorded, and the evidence exists in publicly available form.

This I think is a key episode to show how the students felt that the quality of their educational experience had been enhanced because of Cheryl's teaching. Cheryl relates how

the quality of her educational experience has been enhanced because of my influence (Black and Delong, 1999). At the heart of the relationships within all our contexts is the quality of relationship, the capacity to live out our commitment to education.

I like to think, following McNiff's idea of the iterative nature of generative transformational systems, that the same qualities that characterise this episode as educative are visible throughout all my work and relationships. Perhaps they are not yet there in fully realised form in all contexts, but it is clear that the influence is becoming visible as demonstrated in this episode. I like to think that I will continue to exercise my influence in all the contexts of my professional life such that, eventually, anyone visiting any context within the system for which I am responsible will encounter the same kinds of relationships and hear the same kinds of stories of educative influence.

This, then, is my educational epistemology of the superintendency. It is an educational story of educational stories, circles within circles of influence. I intend to continue trying to show how I aim to influence people in all contexts, so that the quality of education for teachers, students, union representatives, administrators, and all other participants, will demonstrate their own commitment to the kinds of relationships that will ensure that the work is a living out of educational values.

Summary

These are interesting times in which to be an educational leader. I have matured personally and professionally, and am now able more to understand the importance of the research in which I am engaged. My research has helped me improve, be accountable for my actions, and 'shape a professional identity' (Connelly and Clandinin, 1999). I am fortunate to work with many talented and caring people – staff, students, parents and community members. The growing strength of the action research movement in my board and in the province and its capacity to improve student learning sustains my commitment to its potential. I believe that my research is contributing to the development of insider educational theory. I intend to encourage others to produce their accounts of practice to show how my influence has inspired them to exercise their influence in the lives of others for personal-social benefit. If our aim as educators is to create a world better than the one we currently live in through

education, and if we feel we are in positions of influence to do so, we need to support the development of the kind of practical theory in action that will show our practices and also explain the justifications we give for what we are doing. For me, educational administration and leadership are educative, and I hope that I am contributing to a theory of education that will show that educational reality.

End note

Iterative patterns of influence are evident throughout my story. I am showing how I was influenced by Jack, and how he encouraged me to discover and develop my potentials for influence in the lives of those in my care. In turn, I have encouraged the people for whom I am responsible to do the same. In turn, we hope, the children who are the focus of the educational system will find the capacity themselves to become reflective and consider their responsibility in developing a social order in which their children will be happy to live.

Thank you, Jack, for your leadership in inspiring me to develop my own epistemology, and thank you, colleagues, for listening to me while I encourage you to become leaders in your own right.

3. MY LIVING EDUCATIONAL THEORY:

My Standards of Practice/Standards of Judgment (2001)

How do I represent my claims to know my living educational standards?



Jackie Delong
Superintendent of Schools
Grand Erie District School
Board
Brantford, Ontario
Canada.

This photo of me was taken at a social event on December, 16, 2000.

It seems to me that the written word is limited in its capacity to represent my life as an educator and *insider* researcher. (Anderson, 1999) Much has been written about the

acceptability of alternative forms of data representation (Eisner, 1997); however, there appear to be few exemplars to follow. Certainly narrative is one useful form of representing my life that I will use but the printed word is confined both my capacity to creatively describe and explain and the limitations of the language to capture aesthetics, spirituality and emotion. On the cover of Ben Okri's *Birds of Heaven* (1996) is the reminder:

'We began before words

And we will end beyond them'.

I intend to use still photos and where possible video-clips to enhance the capacity of the words. The voices of the people in transcribed conversations, interviews and reports who have lived with me through these years of my research will be added to my own voice in my stories, journals, letters and reports.

Much of my data collection, analysis, synthesis and writing revolves around the role of the professional educator, around my role as teacher and a learner. *What I think distinguishes my work as a professional educator from other professionals such as architects, lawyers or doctors is that I work with the intention of helping learners to create themselves in a process of improvisatory self-realisation (Winter 1998). Stressing the improvisatory nature of education draws attention to the impossibility of pre-specifying all the rules which give an individual's life in education its unique form. As individuals give a form to their lives there is an art in synthesising their unique constellations of values, skills and understandings into an explanation for their own learning. I am thinking of the art of the dialectician described by Socrates in which individuals hold together, in a process of question and answer, their capacities for analysis with their capacities for synthesis. (Whitehead, 1999)*

To attempt to create a holistic picture of my learning and improvement as a superintendent of a large rural and semi-urban school district in Ontario, Canada, Grand Erie District School Board (GEDSB) over 5 years is to challenge traditional forms of data representation and research in educational administration. I wish to bring my voice into the knowledge base of educational leadership to respond to Beatty, 2000: *Indeed, what is missing from the knowledge base for the emotions of leadership are the voices of leaders themselves. (2000, p. 332).*

In Peter Mellett's Review (2000), a clear description of my intention is articulated:

Writers associated with the academy, educational action researchers, and those from other arenas who comment on their endeavours, are all making claims from within their writing to have knowledge. My own claim is that the writers of good-quality educational action research accounts are making a claim to know their own form of life: I am suggesting that, through our practices and our texts, we are making a claim to knowledge *and a claim to life*. We link their own lives with the lives of others in order to bring about an improvement that is life-enhancing and life-affirming. We are showing how we strive to live out our values of freedom, democracy, and justice in our shared lives.

How will I validate my claims to know my standards?

First I would say that my voice informed by the description, explanation and synthesis of the dialogical and dialectical processes that I have used to research my practice over 5 years which is embodied in vast amounts of data is one means of validation:

As action researchers we each ground our epistemology in our own personal knowledge and theorize from that standpoint, each 'I' being conscious of having taken the decision to understand the world from his or her own point of view, as a person claiming originality and exercising personal judgement responsibly and with universal intent (Polanyi 1957). My dual aim in writing this text has been for it to be acceptable from the point of view of current accepted standards of scholarship whilst, at the same time, giving a flavour of where a new scholarship (Schön 1995, *ibid*) that embraces personal knowledge might lead. Those of my readers who arrive at a similar sort of comprehension through a dialectic of question and answer should understand how it is that this text and the selection of papers that follow reflect *what it is to ask, what this thing, research-based professionalism, is*. (Mellett, P. 2000)

Second, the voices of the people in my personal and professional life that have worked collaboratively with me, at times, as co-researchers, provide evidence to substantiate my claims. And third, the available academic literature in the field has both informed and denied my learning. Where it has validated my epistemology, I have recognized that valued support and challenge. Where it has denied my practitioner's knowledge, '*I' being conscious of having taken the decision to understand the world from his or her own point of view, as a person claiming originality and exercising personal judgement responsibly and with universal intent*' (Polanyi 1957). (Mellett, P. 2000), I have confronted that challenge with my own way of knowing. (Belenkey et. al, 1997) Many writers, researchers, thinkers have influenced my thinking and theorizing. Some, like my direct superior, Peter Moffatt, Jack Whitehead, Jean McNiff, Tony Ghaye and Sandra Webber and Claudia Mitchell influence me positively through direct dialogue, shared experience and relationship. Others, like Stephen Covey, Carol Gilligan, Mary Catherine Bateson, Jean Clandinin and Richard Winter influence me through their writing. Still others, influence me because of a negative response to them in direct contact or through their writing. Because I disagree with them, academics such as Ken Leithwood and Jeff Thompson have pushed me to examine my experiences and clarify my reasoning and values.

What approaches did I use to unpack these standards, here?

Over several months late in 2000, I read and reviewed and sifted and reflected on my collection of data – documents, transcripts, e-mail printouts, reports, publications, conference presentations, validation papers, photos and charts - spread over an old pool table extended via other surfaces. Visiting and revisiting the data has been essential to understanding because it is *difficult for the action researcher to grasp everything at once and data may need to be revisited in the light of new experiences*. (James, 1999) I re-read my narratives of school board amalgamation, supporting action research projects, creating the Masters program in partnership with Brock University, my published writings, my performance evaluations and looked with new eyes at the hundreds of photos I'd taken over

the five years. The standards emerged as I peeled back the layers while I turned my life in my mind and looked at new faces of the whole. I found that standards connected and overlapped and I allowed them to do so. For some time I deliberately avoided forcing a form on my theorizing, fearful that my need to control would limit the opportunity to learn more deeply through the process of writing, reflecting and re-writing. I found that each piece of writing changed my knowledge and increased my capacity to theorize. As Van Manen (1988) says, *we are unable to do much more than partially describe what it is we know or do. We know more than we can say and will know even more after saying it.* (James, 1999)

While I do not expend much energy on the qualitative-quantitative debate, I do want to recognize that while my work is that of an individual influencing individuals, it is in a systems' perspective that I have much to contribute. There appears to be a dearth of stories of the lives of systems leaders and in particular of those telling their stories from within the system. Kushner (2000) says, *the bi-polarity is not a bad thing, were they to collide in ways that are constructive in developing sophisticated notions of educational worth, But they rarely do. Educational policy is largely denied the insights of those whose research speaks of direct experience.* (p.206) This research describes and explains the impact on policy of direct experience-mine.

In describing and explaining my standards I have included a number of vignettes that I intend to give life and vitality to my standards. I wish most fervently to avoid the *linguistic checklists* (DeLong & Whitehead, 1999) prevalent in the work of professional bodies like the Ontario College of Teachers and the (UK) Teacher Training Agency. More complete narratives that help to explicate my standards fully are documented in Part II of the thesis - The Evidential Base. And yet, here I am presenting nothing less than a list of standards like posts in a fence. I'm finding that representing *lived experience* (Van Manen, 1990) in a messy process of *improvisatory self-realization* (Winter, 1998) challenging and less than satisfactory when what I have produced appears to be clearly-defined but lifeless categories and lists of what I call 'my living standards.' There is a certain irony there.

I struggled with this problem for several months, During a January 20, 2001 overseas telephone conversation with Jack Whitehead, I decided to see if integrating a few of the thousands of photographs from my research would assist in giving life to the standards. For me, photos are a powerful way of relating to individuals. When I am working, thinking or planning, I am holding people in mind. *The value of the single photograph lies in its potential to help uncover layers of meaning.* (Mitchell & Weber, 1999, p.101) The photo or *vernacular portrait* (Mitchell & Weber, 1999, p.77) links the image to the person with an immediacy that helps sustain the feeling or thought. It is inherent in the sanctity of the personal relationship and a means to create a link to another person with a permanent record. Photographs enable me to make connections with and among people and events, both within my research and my life. Moreover, I have in mind to test out the idea of integrating some *more fluid than frozen* (Mitchell & Weber, 1999, p. 193) video clips as well to pursue *image-based research* bearing in mind Jon Prosser's (1998) view that it *plays a relatively minor role in qualitative research.* (p. 97)

I don't think what I have described here quite gets at what the process has been but I will keep working at it. It seems to me that unpacking, unravelling, the peeling back is part, that creating and re-creating is part and that within this continuous spiral (McNiff, 1992) more clarity of understanding and knowing is emerging. On a metacognitive level, the cycles occur and on a dialogic and dialectic level, they occur in my daily life. On Feb 5, 2001, at our regular Monday morning meeting, James Ellsworth, Curriculum Co-ordinator, shared with me that he found my thesis writing to date to be fascinating and engaging, unlike any research had read before. He said that he thought the photos were like the native wampum in that the stones on the leather thread provided touchstones



James Ellsworth, Co-ordinator of Assessment and Career Education, whom I have known for 30 years

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for the natives to remember stories and the photos do the same for me. They have great depth of meaning for me and seeing them evokes memories, emotions and thoughts. They also reveal facts that I had been unaware of. An example here is the obvious strain that I

was experiencing at the time of the launch of the Action Research Kit, a strain that I thought I was successfully hiding from the world. The photos revealed the truth.

Another example of the revelations that photos have provided has to do with my personal journey. As I looked through several years of photos I could see the love I poured into my children. When I surveyed the photos of various male friends, a light penetrated the darkness of the key to the lack of permanency in those relationships. Because I had been so deeply damaged in my marriage, I was protecting myself from feeling deeply so that I wouldn't be hurt. Consequently, I kept relationships at a surface level and then wondered why I was bored with them after 3 or 4 months. Like the child who won't attempt a task for fear of failure, I resisted deep emotion and maintained a high wall to protect my feelings. The poet Dante began his Divine Comedy: "In the middle of the journey of our life, I came to myself in a dark wood." I feel that I have some guidance and direction from this light in a long darkness.

How do my living standards emerge from my practice?

My standards of practice are the values that I hold myself accountable for in my daily life and work. They are *living* because they emerge in the living of my life according to the values that I hold to be true and at the same time changing and refining as a result of life's experiences. I am in agreement with Susan and Thomas Kuczmariski (1995), *that values stem over time from four factors: 1) family and childhood experiences, 2) conflict events which evoke self-discovery, 3) major life changes and experiential learning, and 4) personal relationships with "important" individuals.* (P. 43) The process of researching my practice has driven me to bore into the depths of my being to uncover and discover what I stand for and who I am; to reveal the ontological nature of my being. It has been an unrelenting poking and probing to find understanding and explanation for my values. Those standards are confirmed or denied from critical incidents that are described by some * as moments of surprise. I would describe them as incidents that evoke anger, feelings of violation and on the other end of the continuum, moments of real joy and pleasure. Reflecting on incidents that elicit strong emotion forces me to confirm my adherence to my

values or to see myself as a living contradiction not living my values as fully as I would like (Whitehead, 1989). These critical incidents are frequently painful and I respond by wanting to deny my actions or the response of others to my actions. Over the course of researching my practice by addressing questions like, "How do I improve my practice?" I have become more capable of facing these incidents for all that they can teach me so that I can improve. I see "improvement", much like Dewey's preferred expression, 'growth'. (Ryan, 1995), as a positive force although I recognize, and must remind myself, that others may see it from a deficit perspective. It seems to me that educators are in the improvement business.

One of the individuals that I claim to have influenced and who has validated that claim is Cheryl Black. I find her definition to be a clear explanation of standards which she says emerged from having read one of the earlier versions of my standards. It comes from her final paper for the Reflective Practice Masters course that Susan Drake and I taught in the fall term of 2000:

My standards of practice would be different than the standards of any other person because every person is a different combination of values. That is what makes each of us unique.

Therefore, if my standards were based on my values, then my standards are just that, mine! The ability to show that my values are evident in my practice and, the knowledge that they make a difference in student learning, will go a long way in helping me define my role as an administrator. (Black, 2000)



Because my responses to critical incidents are both cognitive and emotional, they can provide opportunities for learning and improvement. Much

Cheryl Black, elementary vice-principal, Masters student, friend and colleague for 20 years.

of the research on leadership has focused only on the cognitive and behavioural aspects with researchers looking for models and frameworks to understand the world of the educational administrator. (Bennis, 1989; Leithwood et al., 1999) As an emerging leader, I was encouraged to practice *emotional labour* (Hochschild, 1983) and to recognize that *The*

hierarchical relationship between reason and emotion has particular implications for life in organizations—for leaders and for followers—in that it is often played out as one of mutual exclusion....that same is synonymous with unemotional is re-enacted continually. (Beatty, 2000 p. 334). Brenda Beatty (2000) found in her research that the emotional side of the leader is usually ignored. *Indeed, the emotional causes and effects of so many conditions, to which a leader may deliberately or inadvertently contribute, remain under-explored, while the emotional processes of the leader her/himself remain virtually uncharted territory.* (Beatty, 2000, p.333) Fortunately, the work of Noddings (1984), Gilligan (1982) and Shakeshaft (1987) and others supports what I have learned over time and through experience - that subverting emotions is not antithetical to being an effective leader through caring, connecting and relating.

In fact, I find anger is a useful emotion if I use it to motivate me, incite me to respond in productive ways to improve my practice and the social order. (McNiff, 1992) Such an event occurred on November 3, 2000 at a presentation of the Ontario Ministry of Education (MET) at a regional meeting of The Ontario Public Supervisory Officers Association (OPSOA). After a full morning of provincial directors of MET telling us that what we thought mattered little since the government was going to implement its mandate irrespective of our concerns and only if we were particularly devious would we influence decision-making, I became increasingly outraged. The final straw was the description of the plan for teacher testing and accountability. After four years of work by Linda Grant and Fran Squire and many others at The Ontario College of Teachers (OCT) to develop standards of practice for the province, the MET had taken over the task to once again develop standards of practice.

When I asked if this had not already been done, the presenter seemed surprised that anyone noticed this redundancy and feebly indicated that the past work would be taken into account and that the new standards would be more useful for implementation. In any case, a project team was being hired to create these more quantifiable standards to ensure uniformity and accountability across the province. It was useless to push any further and one is naïve to go head to head with a government this powerful and insensitive. However, I know that I have and can create space strategically for professionals to be *creatively compliant*.

The more I thought about this, the angrier I got. As I analyzed my anger I recognized that I was the problem and the solution. I was a *living contradiction*. I recognized also that increasingly of late I have felt silenced. In my performance reviews over the years, I have been criticized for pushing too hard or for not accepting 'no' for an answer. It's been occurring to me lately that I have kept my tongue and resisted argument for the sake of peace at the Executive table. Even when I challenged the MET staff, I felt that my colleagues from Executive Council disapproved of my challenge to the Ministry. This is clearly eating away at me. In an interview this week, McGill University ethicist, Margaret Somerville said: "Sometimes, it is unethical to avoid controversy." (Greenspan, E. Is this a guy with something to hide? Globe & Mail, Nov 9, 2000, p.A23) That indictment appears to be true of some of our politicians as well as of me.

When I described the incident at the OPSOA meeting to the Brock Masters students the next day, I stressed to them the significance of what they were doing in researching their practice for the purpose of improvement in student learning. External standards deny what we believe but we are so weak in the exemplars. I exhorted them to write and publish their *living educational standards of practice* so that we, as professional educators, can demonstrate to the politicians and the public that we are professionals who hold ourselves accountable. We need the evidential history that is a track record in practice. Just articulating the theory of being accountable or of how it might work is clearly insufficient and not compelling. The Masters group can provide the exemplars and build that evidential history. At the same time that I was asking them to articulate and publish their standards, I committed to doing the same. I could hear the significance of sharing my anger in the words of Trudy Gath, one of the Masters students, in her January 2001 paper:

Upon a response to my proposal from the Research Ethics Board, my perceived progression came to a screeching halt. The Ethics Board rejected my proposal, as I had thought they would, but they wanted me to change and clarify fifteen aspects! My first reaction was extremely negative, as I took their response personally. (I have to learn not to take

things personally.) Upon reflection, I tried to see what I could learn from the experience. From my journal:



I feel like I am going to scream and never stop once I begin. I just received a response from the Ethical Review Committee for my research project. The Committee, all high and mighty, says that I need to resubmit my proposal. They sent me a list of fifteen items that need to be addressed before I may have permission to proceed with my work. I see that they expect me to explain, explain, and explain until I am blue about how I can continue to study my own practice.

I am so upset by this because now, I will spend another four hours or so

Trudy Gath, core
French teacher,
Masters student

explaining, revising, photocopying, and wasting paper when I could be reading relevant material that pertains to my topic, literature that may help me to improve in what I am doing! I am angry at the fact that I need someone from a committee to give me permission to research my own practice! I am fuming at this setback.

From the above setback, I learned to try to understand the position of the Ethical Board in that they have a job to do to ensure the safety of human participants in research projects. I realize that I cannot be a special exception to the bureaucratic rules that exist. I must exercise “creative compliance” and just work around this obstacle. After all, I have managed to overcome many other obstacles before. Regardless, I must push on with my research in my own, very ethical, ways. To my great relief, my proposal was accepted by the REB last week.

Discovering that my anger can be productive, rather than destructive makes me feel better about my emotions because I feel they are helping me to learn. I am learning that one must know oneself before lasting changes and

improvements can be made in practice. "Clearly, self-knowledge makes a difference; it provides us not only with the tools to learn but also with a foundation for all we do with students." (Cohen, 1999, p.19)

In analyzing my anger at the ministry session, I was reminded of the Miller and Boud's (1996) *denial of feelings is a denial of learning* and extrapolated that to a growing realization that what the conservative government has tried to attain is a complete eradication of emotion from education. The evidence lies in that fact that they have ignored what is the basis of much of what happens in any school but particularly in secondary school out of classroom activities. Coaching and directing plays and bands is volunteer activity that comes from goodwill and commitment to the well-being of students. It appears that politicians think in market policies, bottom lines, profit margins and four-year election cycles.

I heard the same mentality in the MET presentation that teachers would be tested using quantifiable standards, now being called "standards of learning", that would go beyond the new OCT Standards of Practice. It is definitely problematic that feelings, caring and commitment can't be easily quantified:

Emotions and feelings are key pointers both to possibilities for, and barriers to, learning. Denial of feelings is a denial of learning. It is through emotions that some of the tensions and contradictions between our own interests and those of the external context manifest themselves. (Miller and Boud, 1996: 10 in Ghaye & Ghaye, 1998: 81)

This engagement with the political, this insight into myself, will evoke my standards of practice which are my living educational standards and show the meanings of my educational values that have developed and emerged over the last 5 years. The articulation of those standards is a creative process that includes my anger at the power of politics, the pleasure and joy in influencing by creating conditions, encouraging and supporting teachers to research their practice. The emergence of my values as a professional educator must be

made communicable and understandable. There is a creative tension that emerges from the anger, the passion between what is being done *to* teachers and what can be done *with* teachers. In the work of Paul Begley (1999), there is some good rhetoric about the nature of values. I believe that I can take this forward and onto a different 'embodied' base by taking values to be embodied forces/power for action and meaning. I think that Bernstein's (*The New Constellation* 1993) 'ethical imperative' is pertinent:

"... to listen carefully, to use ... linguistic, emotional, and cognitive imagination to grasp what is being expressed and said in 'alien' traditions ... [without] either facilely assimilating what others are saying to our own categories and language ... or dismissing ... [it] as incoherent nonsense."

At the Delhi DSS graduation on November 3, 2000, a young secondary English teacher, Carolijn MacNeil, introduced herself to me saying that she was conducting an action research project with James Ellsworth, Coordinator of Assessment and Accountability for GEDSB, on using portfolio assessment in her classroom to improve student learning. She was very animated and impressed that she had talked to me in person and had used the Action Research kit (DeLong & Wideman, 1998). Later Cathy Bauslaugh, one of the principals in my Family of Schools (FOS) whose son had graduated in the ceremony, informed me that Carolyn had shared her excitement later at the pub and on Sunday evening (Nov 5, 2000) I received the following e-mail:

Hi Jackie,

It was wonderful to meet you at the Delhi Commencement/

I hope that I did not come off as a crazy lady, but I am really fired up about Action Research and my own personal project:

How can I use Portfolio's in my classroom to help students take more responsibility for assessing and monitoring their work? How can I

encourage students to view the act of learning more important than their
MARKS!!!?

I want to thank you for supporting Action Research and encouraging teachers to become responsible for their own professional development. I will keep you posted about the police college. My husband says that action research is the buzz word around there now.....what a concept!!

Carolijn MacNeil
English teacher Delhi

I enjoyed the interaction with this teacher whom I had never met before as well as the sheer delight, energy and affirmation to counterbalance the ugliness of the politics earlier in the day. I think I can claim some influence here in that I supported and encouraged James, proposed and received the money from the Educational Change Fund to conduct the project, and wrote the kit with Ron Wideman that she was using. In addition, her principal, John encouraged her to get involved and he is one of five principals this year conducting an action research project as his performance review process. The evidential base for these crystalized claims to my influence are to be found in portfolio of narratives in Part Two of the thesis.

Another victory narrative (MacLure, 1995) is the story of my work with teachers using test results to improve student learning. It is a story of influence. As one of the principal investigators of An Action Research Approach to Improving Student Learning Using Provincial Test Results (Wideman, Delong, Hallett & Morgan, 2000), I supported teachers to improve their practice and student learning by using test results:

Abstract

During the 1999/2000 school year, seventeen elementary school teachers and five consultants from two Ontario school boards, conducted action research based on the 1999 EQAO provincial test results for Grades 3 and 6 and the use of feedback/corrective action to improve those results. Paired with a "critical friend", individual teachers analyzed their schools' results and identified areas for improvement. They identified action research questions, investigated the questions in their own classrooms, collected data to evaluate the impact of their work, and recorded their investigations. The teachers' own assessments and the 2000 EQAO test results indicate substantial success. Teachers began to see provincial test results as friendly data that schools can use to improve student learning, and action research and feedback/corrective action as powerful methods to do so. The study contributes to understanding how provincial testing can be used to improve student learning and what constitutes effective teacher in-service education.

These teachers, I believe, are evidence that researching your practice brings improvement in teaching and student learning. (See Chapter Five: Findings in Wideman, Delong, Hallett, & Morgan, 2000) This work is one of many that have been collaborative works with Ron Wideman:

This is a photo from
(Wideman,
DeLong,
Hallett, &
Morgan, 2000)
of my friend
and colleague
for over 7



Another aspect of the living reality of my life as a superintendent is the fact that taking time for this reflection and self-study is an indulgence that is only

possible after I have completed the preparation for the tasks of the week ahead. These tasks include: answering e-mails, responding to phone calls from staff and parents, processing paperwork such as mileage claims, leave and expense forms, reporting to the Board on test results and preparing presentations such as Special Education for a Family of Schools meeting, or Assessment and Accountability for a professional development program for all school administrators. Despite the fact that these tasks come first, my fury does not subside but serves to stimulate my creativity and focuses my attention on the nature of power relations and ways to respond creatively to power and politics. I need to engage in the controversy but also need to be prudent and find an appropriate stance so that I don't get eliminated from the fray and so that I can *influence social formation* (Bourdieu, 1990).

When I examine the nature of my influence, I feel that I model *creative compliance* and being a *living contradiction*. I am not sure whether I exhibit a multiplicity of selves or as Bateson (1990) says, not *a purity of will*, but *a divided will* which may be a *higher will*. Just as I work constantly with a “parking lot”, with the ability to hold so many relations and projects and ideas on the go at the same time, I know that is part of my capacity to get things done on several fronts at one time. I describe this facility more fully in Standard Six.

In this work I attempt to answer the question, “What kind of superintendent am I?” and to make the *tacit explicit* (Polanyi, 1962) through my own *way of knowing* (Belenkey, et al, 1997). *By living values that are embodied in our practice [and] their meanings can be communicated in the course of their emergence in practice.* (Whitehead, 1992, p.193). Frequently in a relative state of *dynamic equilibrium* (Ghaye & Ghaye, 1998, p.36) my values emerge in my practice but do change and modify. My values have been challenged by provincial testing of students, by the dominant philosophy of market forces and by imposed changes such as amalgamation that appear to have no relation to improving student learning and frequently place me in precarious stability. (Schein, 1969). I find myself to be a *living contradiction*. That tension in *holding certain values and experiencing their*

negation at the same time (Whitehead, 1992, p.6) has provided me with a context in which to test my values and to validate the standards by which I wish to be judged. Those standards are the values by which I live my life. I have engaged friends and colleagues to hold them under review. As Polanyi (1962) suggested, I have made and continue to make to make them public so that I can be held accountable for them.

My living standards are shared in two parts: standards as a superintendent and holistic standards. The logic of this separation is that the standards by which I wish to be judged as a superintendent are more specific to that role. The holistic standards pervade both personal and professional and as well tend to overlay the other standards. The division may be simply that the living educational standards are epistemological and the holistic are ontological, the difference between knowing and being.

What are these living educational standards by which I wish my practice as a superintendent and professional educator to be judged?

I am attempting to communicate my standards of practice derived from reflection on the values that matter to me. I hope that by being in touch with those values I will be able to make a significant contribution to the knowledge base of educational leadership. I wish to engage with the ideas of David Clark (1997) on the need for educational leaders to engage in research on their own practice and I hope to avoid concluding my life with his negative assessment of his influence on educational leadership. The values that I am articulating are grounded in my practice, in what I know from reading and dialogue, from experience and from reflecting on that experience. Through writing about my values that emerge in my practice, I am able to construct and deconstruct the transformation that has taken place over the six years of the research and to understand what has moved me forward.

There is no significance to the fact that there are ten standards, nor is there any hierarchy of importance. The following standards, which are continuing to emerge, are the values that I hold and intend to practice in my professional life and for which I wish to be held accountable.

1. Creative compliance in response to negative policies
2. Fairness and equity: focus on rights of children
3. Focus on children by partnering with parents and community: collaboration and involvement
4. The sanctity of personal relationships
5. Showing care through empathy, listening for the concerns of others, support and time spent
- 6. Reflection, inquiry, research and action**
7. Sustained support of action research to improve student learning
8. Commitment to task, high expectations, drive and accountability for results
9. Professionalism and professional behaviour
- 10. Responsibility to act locally and publish globally**

Standard One: Creative compliance in response to negative policies

During the six years that I have been a superintendent the political landscape has changed remarkably. With the election of the conservative government in Ontario we started down the same path as the UK in the oppressive policies of economic rationalism. Up until that time, it seemed that I could envisage and implement an agenda of constant improvement with a view to a better future for our children and their education. I naively thought that I could continue with this momentum under the new market-driven policies. The culture

changed dramatically. While this change began to roll over us before amalgamation in January 1998, the full force of the wave hit at that point. It seems that we have been trying to catch our breath ever since and that there are only small spaces where I re-capture the beauty and joy of the educational experience that had existed prior to amalgamation. Beside my natural disposition to be an eternal optimist, it is those small spaces that motivate me to keep pushing and driving forward toward a better world for students and educators. In addition, I simply refuse to accept failure and acceptance of the status quo. The pressure to use the capacities and influence that I have, to make improvements also motivates me. I can; therefore, I must.

One of the forces that has transformed my practice has been the economic rationalist policies of the Ontario government, policies that unfortunately are common world-wide. (Whitty, 1997, MacTaggart, 1992).

Part of my obligation as a leader is to carry the hope for the people for whom I am responsible. My own concern or depression cannot be visible. If the leader despairs, others give up. There is no room for defeat when you have the responsibility of preparing the next generations for the future. And yet, there have been times when I have allowed my concerns to be visible. While people expect me to be strong and positive, they also need to see that I feel vulnerable and unsure and yet keep the faith to move on. In order to accomplish this mandate, I have learned to be prudent. Running headlong into a mammoth (read "Progressive Conservative government") is unlikely to be productive. I have learned to be more patient, more subtle and more strategic in challenging the powerful forces that interfere with the important relationship for learning between the child and the teacher. Those skills of diplomacy continue to develop so that I am more frequently able to accomplish what I want without alienating those with the power.



This is a photo from (Wideman, Delong, Hallett, & Morgan 2000) of my friend and colleague for over 30 years, Diane Morgan, former Coordinator of Assessment and Accountability, now retired and working as a consultant on contract.

A case in point is my role in provincial testing. I have not valued standardized testing except for some specific purposes such as the investigation of a child's learning difficulty. After I was able to reflect with Diane Morgan on the fact that provincial testing is criterion-based and can provide useful data for improving the teaching and learning of language and mathematics (DeLong & Morgan, 1997) and given that it is mandate that demands compliance, I have learned to be *creatively compliant*. The creative part is the fact that I have also been able to assist teachers to conduct action research as a means to use the testing data to inform and improve their practice. Another useful impact of testing occurred at the November 20, 2000 Board meeting when I presented the results of the provincial testing in the spring of 2000. The chair of the board commented that she thought we should be considering additional resources for the schools with low achievement. That was the first time I had hear the issue of Compensatory schools articulated since the formation of the new board. That is a value of mine – providing extra supports for needy children in low performing schools (see Compensatory Education). The test then had provided data to support compensatory education.

On the other hand, sometimes compliance is just that – compliance to act in violation to your values. At the board table as a member of the Executive Council I have recommended the cancellation of programs such as Music support teachers and Reading Recovery not because they weren't valuable and good for students but because there was no money in the

funding envelope to pay for them. The same applies to the accommodation studies for which I was responsible. Despite my belief that small schools provide good education and are the heart of small communities, the studies recommended the closing of 6 small schools in my family of schools. If you look at the big picture and recognize that if the money is a limited resource and that the board has the responsibility to provide for the needs of all the students, it becomes weighting one value over another. Spending over budget in one area robs another area of their fair share. . Generally I work with the people and the organizational structures within the system to make it better, to widen my circle of influence (Covey, 1989). My standard on this is that the same opportunities to make change are not available if you separate yourself from the system. I try to make a difference for children and families by working and researching *as an insider* (Anderson & Herr, 1999) to improve the organization.

Standard Two: Fairness and equity: focus on rights of children

These are not the same. As with my value on compensatory education, fairness is giving more to the needy children so that they have an equal opportunity to achieve. It doesn't mean treating all children the same. I believe in extra supports for the children who need them. If that is a socialist philosophy, so be it. I think I counter the accusation of being a "bleeding heart" with the notion that for us all to fully benefit from the wealth of this country (UN study), we need to provide extra supports for those who haven't benefited from the wealth. This, you recognize, is at odds with the conservative government. For them it is survival of the fittest and unfortunately children are vulnerable and don't make a profit. In the current climate and with an aging society, health care, reducing taxes and making money are the priorities. Children cost money. Unfortunately the impact of reducing services to children and families will not be evident for 20 years and governments think in four-year cycles. Without pressure on governments who rule by polls, there will continue to be little emphasis on education and more parents with money will choose private schools and the poor will suffer. It is appalling to see and read of the thousands of children that live in poverty in a rich country like Canada.

To correct what is missed in the narrower perspective of 'human capital' and 'human resource development', we need a broader conception of development that concentrates on the enhancement of human lives and freedoms, no matter whether that enhancement is – or is not – intermediated through an expansion of commodity production. Amartya Sen (2000)

The evidence in my data archive resides in the my work in compensatory education, in the Pauline Johnson Family as well as in my current family in allocating extra resources to schools with high needs (as identified with EQAO results, social assistance recipients and average income statistics). (see *Compensatory Education*)

Standard Three: Focus on partnering with parents and community: collaboration and involvement

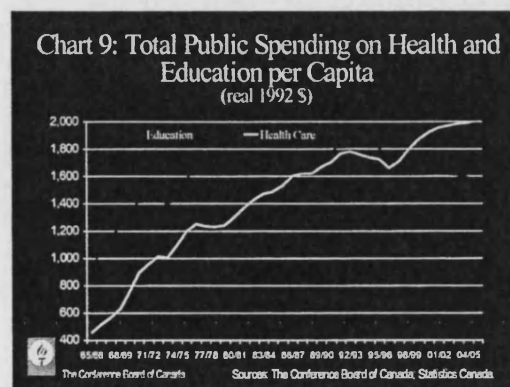
No matter whether I am talking about my own children or the children of the school system for which I am responsible, I think children come first. The most influential people in a child's life are the parent/guardian and the teacher, in that order. Continuing the standard above, I believe the overworked adages that our children are our future and that it takes a whole village to raise a child. *The evidence is beyond dispute. When schools work together with families to support learning, children tend to succeed not just in schools but throughout life.* (Henderson & Bela, 1996) If that were the standard of our society, systems would be different. My anxiety is that children are not always valued. The current emphasis in Canadian society seems to be on making money for material things and not on providing emotional and social supports for children.

This following chart that was presented by James Dininger, President and CEO, The Conference Board of Canada at the Ontario Hospital Association in Toronto on Nov 6, 2000 was a shock to many of the health professionals and governors in the audience:

Both James Nininger and Dr. Nuala Kenny, Head of Bioethics at Dalhousie University, Nova Scotia talked about the improvement in spending on Health but talked about the ethical issues surrounding the de-emphasis on education. When I spoke at the conference I tried to engage health professionals in the need to share the wealth of health care and to partner with schools and families to improve the plight of children and educators.

Building community and family partnerships has been and continues to be one of the foci of my work. It is clear in the reports on the EQAO action plans – 1998-2000, in media reports (see Nov 21, 2000), in Communications (Communications Strategic Plan, October, 2000), in the role of School Councils, in the levels of involvement (Delong & Moffatt, 1996) that I feel strongly that parents can make a difference in the achievement of their children and need to be engaged as partners.

As our School Councils struggle to find a meaningful role in the work of schools, there is increasing pressure for them to engage in the role of creating the home-school link. (Murphy, 2000) With the GEDSB emphasis on literacy and improving student achievement, during 2001 I made a concerted effort to engage School councils and municipalities in supporting the initiative. One of the action research projects using portfolio assessment under James' guidance is investigating the relationship between parental involvement and John Kinnear, one of my rookie principals, is researching his practice in parental involvement. The Vice-chair of the board, Lori Burroughs, recruited the mayor and community officials to become involved and scrounging for prizes. It was surprising and affirming to see how willingly groups and individuals committed to the cause.



Standard Four: The Sanctity of Personal Relationships

One of the discoveries from ‘researching my practice’, or ‘living my research’ (because it is difficult to separate the two. I guess that makes sense in a self-study), is that I am better able to teach and build relationships when I share anecdotes from my life’s experience. Part of my growth has been a recognition that unless I am prepared to give up some of my privacy and let people into my world by telling stories, I struggle to build positive relationships. A case in point was November 18, 2000 when I was leading a discussion with the Masters group on *living contradiction* (Whitehead, 1989) and the tension that comes from having your values denied. We talked about alternatives to resolving the tension through head on aggression such as working to change the situation or system or walking away from the situation.

I shared two stories of experiences where I had determined one of these was the better option. In the first case I talked about my values conflict over mass testing of student and my internal struggle with that especially give the fact that this is major part of my system portfolio and that our board results are not good. Despite that tension I continue to work at making the process work for students. In the second, I shared the story of leaving a job that I loved because of a difference in values with a superior and after having tried to build a relationship with her for 3 years, I knew that I my best choice was to find a new job. It is difficult for me to build relationships with people if I only allow them to see single dimensions of competency or intelligence and not the doubts, concerns and setbacks with which I live and struggle. As Susan Drake (1992) says, “You teach who you are.” I would add that to teach and to relate to others, you must share the stories of your experiences so people know your values and can share your journey.

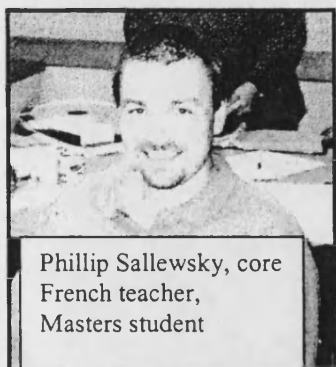
I try to preserve relationships at all costs. As with all of my partnerships, I start with the relationship and then worry about the details of the arrangement. I had a vision of what the Masters cohort group might look like but I could not make it happen without the right relationship. My relationship with Susan Drake has had an eight-year history, starting first with my responding positively to her writing on integrated learning. Then I invited her to work with the principals in the North Park Family of Schools where I was principal from

1992-1994. Then we met through the Ontario Educational Research Council (OERC) at annual meetings, conferences, and then as board members. Finally in 1999 Susan and I met over dinner with Ron, and Jack and the opening seemed there with the new dean at Brock, Michael. The full process of creating the masters program is described in Part 2: The Evidential Base. Over the next year the implementation of the program deepened the relationship among Susan, Michael, Jack and I. We became not just colleagues but friends.

After the 2000 OERC Conference and a very successful presentation by the Masters students, the four of us went out for a celebratory dinner. In the post dinner conversation, Michael dropped the bomb that I was no longer going to be one of the instructors because several of the students had complained of power issues. I was totally shocked. I asked how many students were concerned. He replied about a third. I had a great deal of difficulty comprehending this. How could I have been so unaware? This was totally contrary to what I intended and I said so. I also said that if this was the case, I agreed that I should withdraw. I was still bothered that I was surprised by this and that I was perceived in that way. Jack was surprised as well. I left the restaurant in dismay and defeat. Also angry. I felt there was more to it. Why wouldn't he tell me the whole story? I felt that the trust that had built up over two years had been broken. The rest of that night and the next day I reviewed and reflected on the conversation. What had started out as a perfect day was in ruins.

My nature is to confront. After thinking and talking with Jack and Cheryl about these events, I called Michael at home the next day. I asked him if he could tell me more about this situation so that I could understand. I explained that it was important to me as a superintendent and as a researcher to understand when I am perceived as abusing my power. He said that some students were experiencing concerns about my position power as an instructor in the course.

Standard Five: Showing care through empathy, listening for the concerns of others, support and time spent



Phillip Sallesky, core
French teacher,
Masters student

The significance of telling the narratives struck me when one of the masters students, Phillip, a young man who is a very good

teacher as well as a good student and who has great potential to be a school administrator, asked to talk with me privately. He talked about a situation where he was in conflict with a superintendent in another board and showed me e-mails where he had asked for a post-interview and been refused. He is a young man in a hurry and had been using an unproductive approach to problem-solving. I asked him if he still wanted a job in the other board. When he answered in the negative I asked him why he would continue the battle. He felt that he had been treated unjustly and was worried that his reputation would be damaged in discussions among superintendents. I replied that under the right to privacy legislation, he could not be discussed without his permission. When I assured him that his reputation was intact, that I cared about him and that he had a bright future in our board, he seemed to relax and concluded that it would be prudent to walk away from the conflict.

I was reminded once again of the importance of *spending time* (Backus, 1998). He had mentioned as well that he had phoned another superintendent to get some feedback from a job rejection in our board and his call had not been returned. His face seemed brighter and his walk lighter when he left. The conversation had the same effect on me – I was tired and not feeling well but I felt good that he felt comfortable to share his concern, I had attended to his concern and had showed that I cared. As Cheryl affirmed, *Listening is caring. Sometimes (and I forget this) people only need to vent. They don't need you to do anything, just listen. The fact that someone cares enough to listen and, the importance they place on that person's opinion can make the listening the most important act A reaction is not necessary many times. The difficulty is knowing which time is which.* (Black, e-mail, 01/04/01)

Another of the Masters students, who is very young and a real delight, has taught me a great deal about the meaning of support. She has reinforced my commitment to getting the voices of teachers into the public arena as part of the knowledge base of teaching and learning and being a professional educator. Julie White has “real knowledge” of what it means to be a dedicated teacher but goes through periods of self-doubt. Despite getting recognition in a



Julie White, a classroom teacher whom I have known since 1999, is presenting to the Grand Erie District School Board meeting on her action research project, “How can I improve the writing skills of my Grade 4 students?” June, 19, 2000.

variety of venues (board meeting,

conference presentations, large-scale research studies), she doubts her knowledge. With very little effort on my part I send her the message that she is valued and can produce good and important work by just being herself, by doing it her own way:

When Julie was having difficulty with an assignment for a Master's course, I talked with her both on e-mail and on the telephone to listen to hear concerns and encourage her to believe in her own capacities. Her response told me that I had been helpful:

Dear Jackie,

I just wanted to thank you for helping me get a handle on the review. I have to tell you, at the start of the article, I felt completely lost. It seemed as if it was over my head, but your guidance made me realize that I did understand it in my own way, and could relate it to my practice. My response didn't need to be written with big words. It was just a response from me being myself.

While reading *Awakening Brilliance*, I came across a quote:

"Teacher's who come to a place within themselves where they're happy and proud of who they are, have internal feelings of self-worth and self esteem. Then their ability to pass on these good feelings to their students multiplies a hundredfold.."

I just wanted you to know that although there are some times I doubt myself, become confused like in the review, or just feel like I have no time to myself, the Master's course, my research, and your help and advice always seem to put me back on track and feeling good about myself. Monday's after the Master's course always seem to be the best for me. I guess it's the good feelings I drive away with on Saturday afternoons. Just wanted to say Thanks.

Julie White (e-mail, Dec 2000)

In leadership roles, I recognize that there are different balances at different times on people and task. A focus on people or on caring can be viewed very differently. When I became the supervisor for my new family of schools in the former Norfolk area, the definition of “caring” was one of overt, demonstrative, “flowers and chocolates” type of caring. This had never been my way and some staff found the change uncomfortable and felt that I did not care. I say “some” because I was to learn that the “caring” had been for a limited, privileged few and not available to all. James and Peter Rasokas, principal-leader in my area office, and several others have described my kind of “caring” as extensive, purposeful and sustained support for people.

Standard Six: Reflection, inquiry, research and action



Ron Wideman and I have been co-writers of many articles and a Kit, colleagues and friends for over 7 years.

I have a firm belief in the value of reflection in and on action (Schon, 1983) and the importance of inquiring into my practice but that is combined very definitely with the expectation and obligation to act to improve the way we do things. I believe that I have a responsibility to share what I know and to encourage those that I influence to do the same. In the video in the Action Research kit (DeLong & Wideman, 1997), in answering the question, “What do you need to be an action researcher?”, Peter Moffatt replied, “You need an inquiring mind.” I

believe that is an answer to the question, “What do you need to be a reflective practitioner?” While I think there is more involved in action research than reflection, I am in agreement with him. To be an action researcher, you need also to act to improve the world in which you operate and further, to be an educational action researcher, you need to improve education. First, I believe I model that behaviour as I investigate my practice as an educational leader, Second, I encourage and support educators (in its broadest sense –

support staff, elementary, secondary and university teachers, educational assistants and instructors) to research, improve their practice share their new knowledge with their colleagues.

When I provide supports to teachers to conduct action research, I am clear that I expect a written report and some way of sharing their research. In order to define the means of sharing, I like Peter Moffatt's way of stating that they share *on a stage where they are comfortable* (Moffatt, 1997). It is in the public accountability and publication that a knowledge base of the messy and largely unquantifiable world of teaching and learning becomes accessible to the practical world of educators. It is also a means to virtually eliminating the gap between theory and practice when the practitioner is the theorist and the theory develops from the immediacy of practical need to improve student learning. In *Teacher Research and Educational Reform: Ninety-third Yearbook of the National Society for the Study of Education (N.S.S.E.)* Susan Lytle and Marilyn Cochran-Smith make the same point:

Research by teachers represents a distinctive way of knowing about teaching and learning...[Teacher research] will fundamentally redefine the notion of knowledge for teaching, altering the locus of the knowledge base and realigning the practitioner's stance in relationship to knowledge generation in the field. (1994, pp.35-36)

In my research and indeed my workday world, I find academic theory from university researchers informs my practice when it supports or challenges my thinking in an area that I am investigating in my life as a practitioner. Without that hook on which to locate the theory it becomes merely an interesting but useless idea or concept.

In the groups with whom I frequently work, it has become almost a joke to follow any proposal with "And how will you know that this is improving student learning? While I do not lay claim to having accomplished this single-handedly, I do claim that there is a stronger sense of "asking hard questions" and to greater accountability for results in the Grand Erie Board. I want to be held accountable for results and expect the same of others. Reflection requires action to bring results and improvement.

Standard Seven: Improving student learning through sustained support of action research.

As I was teaching the masters class on Nov 18, 2000 I reflected on the journey I had travelled from 1996 when the 5 teachers and two school administrators started courageously down the unknown path of researching their practice through action research. From those early days when Jack Whitehead was exhorting us to get the research of teachers accredited in the academy and many thought he was “off his rocker”, it is a recognizable step forward to the fall of 2000 when Susan Drake and I were teaching the Grand Erie – Brock University cohort masters group of 15 Grand Erie staff and 2 teachers from another board based on Jack’s work. While one of my objectives was to give a voice to teachers’ knowledge, it was overall to encourage and support teachers and administrators to conduct research in their schools in order to improve their teaching and student learning. Bob Ogilvie (2000) describes this rather well:

The history of the Brock/Grand Erie Masters Cohort I think bears this out. It began as the brainchild of Grand Erie Superintendent Jackie Delong in the spring of 1999. She envisioned a co-operative venture with a university which would provide an opportunity to both further her work in action research and develop a more coherent leadership pool within the Grand Erie Board. Negotiations with several education faculties brought her into contact with Dean Michael Manley-Casimir of Brock University and an agreement was forged between the Grand Erie District School Board and Brock University to offer a highly concentrated Master of Education program to a minimum number of Grand Erie educators. Whether the concept continues life as a repeated series of Masters cohorts remains to be seen, but certainly that is goal well worth pursuing. Education desperately needs capable, knowledgeable leaders, and this cohort could be a means of more properly meeting that need, whether its graduates pursue administrative roles or not.

The process over 5 years has been filled with successes and failures, of three steps forward and two steps back, of persistence and hard work and of willing pioneers as well as

naysayers and blockers. The M. Ed. was just one piece of the puzzle that was action research in my board and across the province. In that time teachers' research in the former Brant Board, now Grand Erie DSB and across the province had been published in a wide range of journals and publications. These include: Act Reflect Revise, Revitalize (1996), the Action Research Kit, School Improvement Through Research-based Professionalism (1998), The Ontario Action Researcher website <http://www.unipissing.ca/oar> (1998-2000), and the Education Quality and Accountability Office (EQAO) (2000). Their research had also been presented at four Act Reflect Revise conferences (1996, 97, 98, 2000) and at the Ontario Educational Research Council Conference (2000).

There are many indicators of progress. For the first time, a session on action research workshop was delivered at a board-wide administrators' conference in Grand Erie on Nov 16, 2000. In the session on the EQAO study (Wideman et al, 2000), Margaret Juneja shared her research on using grade 3 test results and the corrective action strategy (Sutton, 1995) to improve learning. (See also Neeb, White) Provincially, nationally and internationally, I have been recognized and invited to speak on my experiences and research:

- December 8, 2000: OERC Award for Leadership in Action Research
- January 25, 2001: Brock University Principals' Course
- April 7, 2001: International Conference on Teacher Research
- April 21, 2001: Quebec Conference

Another indicator of the progress is that people that I coached and supported are action research leaders in the board and in the province. People like Cheryl Black, seen here in frames from a video-tape of an interaction with a student which shows the depth of caring and joy in their relationship. This clip from her research on her life in the classroom demonstrates the values she holds that are her standards of practice. Further, it provides evidence of my support of her research on her practice.



Whether we think about emotional literacy in terms of my relationships with staff, family or here in Cheryl's rapport with her student, it is essential to take it into account as a value I hold. In this series of photos taken from a videoclip, a student in Cheryl's music classroom sees a bit of lint on Cheryl's jacket and feels sufficiently safe to thoughtfully remove it and cause that joyful expression on each of them. See that the student is still holding the emotion as the world moves on. Precious moment.

This is a territory of distinct awkwardness and discomfort for many academics and politicians and yet it is being embraced by some British politicians:

James Park, the director of Antidote, told The Observer:

It always matters that we are sufficiently in touch with our own emotions to be in touch with those of others. The pace of change is so fast now that people need emotional literacy to steer them through the choices and be able to cope with it.'

Antidote aims to create a 'listening culture', putting emotional literacy at the heart of the education system. But it does not stop there. It aims to create emotionally literate economic policies, declaring: 'Market-centred forces persuade many to deny support for those public services and welfare measures that promote the well-being of the wider community.' (Browne, A. 2001)

<http://www.guardianunlimited.co.uk/Archive/Article/0,4273,4120743,00.html>

I was interested in a website called Antidote dedicated to emotional literacy in which Susie Orbach says:

Emotional literacy means being able to recognise what you are feeling so that it doesn't interfere with thinking. It becomes another dimension to draw upon when making decisions or encountering situations. Emotional expression by contrast can mean being driven by emotions so that it isn't possible to think. These two things are often confused because we are still uncomfortable with the idea of the validity of feelings.

We allow them in certain kinds of endeavours and exempt them in others. There is a real difference between bringing emotional literacy to the political agenda and substituting emotions for a political agenda. There is a real difference between bringing personal issues into the political framework - relations, work and home, parents and children - and understanding the political nature of such relations.

Everywhere we witness the depoliticisation of our culture. Rather than deepening the political by linking what people feel and the conflicts we need to come to terms with, we strip the emotional of its connection to the political. Emotional literacy by contrast increases political literacy by joining issues where they need to be joined and separating political and emotional issues when they have become fused. It's not a substitute for political expression but a strengthening of it. (Orbach, 1998)

In the Antidote website, the authors talk about the discomfort many feel when the topic of emotional literacy is articulated: *We were joined by academics, management, consultants, diplomats, environmentalists, lawyers, all people who were excited by the notion of pursuing an agenda that brought emotional literacy to the public debate. But despite this prestigious raft of supporters the idea of Antidote and of emotional literacy made some people very uneasy. They could sense that we were saying something valid, but it was just that bit out of reach.* <http://www.antidote.org.uk/wisantid.htm>

The problem lies in the fact that the description and explanation of the life of a professional educator is severely limited if emotion is eliminated from the understanding. In the photos above the value of the visual image in helping to communicate the meanings is clear to both Cheryl and me. I hope that the reader can 'see' the quality of the relationship in the images. The complexity of using language to communicate the meanings of emotions (attached to fundamental values) has been recognized by many researchers and the recent moves in the UK government and the antidote web site emphasize the importance of emotional literacy. For that reason I intend to include it.

In September, 2000, I created guidelines for classroom research and was able to convince Planning Council (albeit reluctantly and after a considerable struggle) to set aside \$35,000 for school-based classroom research and an additional \$20,000 for two system action research projects, one on portfolio assessment and one on student-led conferencing from the Educational Change Fund.

My involvement on the Ontario Educational Research Council (OERC) Board as President-elect and my work on the annual conference is another vehicle for supporting action research. I have encouraged and supported teacher researchers to present their research at this conference for the years of 1999 and 2000 and brought Jack Whitehead to speak to the gathering. At the 2000 conference 15 Masters students (teachers, consultants and school administrators), 4 consultants and 3 teachers presented their action research projects and 3 other teachers attended with my support. The GEDSB group represented a significant number of the group in attendance. As I watched and listened to the Masters Students present, I was inspired by their capacities. In his Reflective Practice paper, Cohort Story: Re-Searching Together, Bob Ogilvie (2000) captured the event:



Nancy Carroll, grade 3 teacher, Houghton Public School presenting at OERC, 2000

We are lined up side by side in a manner that reminds me of Monday Night Football where players introduce themselves in little video clips....

"Phillip Sallesky, Intermediate core French, Grand Erie District,...negotiating curriculum".

"Janie Senko, Grade 5, Grand Erie District,... integrating curriculum"

"Marilyn Davis, Secondary English, Grand Erie District.... improving student writing".

And so it goes, through all thirteen of us.....not linebackers, quarterbacks and kickers, and hardly the Miami Dolphins, but a real team nonetheless. We are the Brock/Grand Erie Masters Cohort, and seated in a row on either side of Jack Whitehead, we recite the litany of our names, jobs, and thesis/project topics to the assembled audience at the 2000 Ontario Educational Research Council conference. I am the first to speak and as we move down the line I am at first attentive to the audience, but then quickly

drawn back to a focus on us, for I am forcefully struck by how articulate, clear and confident we have all become. This is not at all the nervous, halting and uncertain group which began together fifteen months ago, and I wonder yet again about the process that has enabled this to be so.

One of my purposes in negotiating the cohort model for completing a Masters degree was to give the students as much support as possible and one of these was a supportive, interdependent group, a group that stayed together through the learning process. I agree with Bob Ogilvie's (2000) observations about the value of the cohort to build community:

While this cohort and my participation in it has become the focus of my study, I believe an increased understanding of "cohort-ism" can also be of real value to teachers in general. I believe that the ten principles of reflective practice (Ghaye and Ghaye, 1998) can apply just as much, and in some cases more so, to collective reflection-on-practice than they do to individuals. The possibility of improving emotional environment through purposeful cohorts, groups or communities of reflective learners may help teachers succeed instead of merely survive in the current educational context. Stephen Covey (1989) contends that, "Dependent people need others to get what they want. Independent people can get what they want through their own effort. Interdependent people combine their own efforts with the efforts of others to achieve their greatest success." As a personal value, I too believe that togetherness, cooperation and teamwork are distinctly better than working alone to achieve many goals. (Ogilvie, R. 2000)

The 2001 OERC Conference, which I will co-chair with Cheryl Black, will be held in Brantford on December 7-8 and the program will feature Jack Whitehead and our researchers. Two of the students will present with me at the Quebec Conference on April 19-20 and one will attend with my support. My commitment to sustained support of action research continues.

Standard Eight:

Commitment to task, high expectations, drive and accountability for results

It seems incompatible to stand for task and results and at the same time care for individuals. I don't think it is. Without the drive to improve, the systems and supports would not be created. In fact the underlying purpose is a care for people. When I push an agenda or direction, I see a vision of what can be. I pull and sometimes push people in that direction, towards that vision. I know that they don't always see the vision until they are closer to it. For that reason I try to engage them in the activity based just on faith and trust. I know that I can't make the vision happen but they can and I'm there for the support systems.

My penchant for commitment to task needs to be held in check. I have had frequent feedback that I need to remember the impact on people especially with my high energy level. I regularly remind myself that others don't always have either my passion or my energy. Still it is that passion and energy that gets things done. It is an assumed fact that I work hard. As Maria said to someone's concern that a certain project would be hard work, "I'm not afraid of hard work. I work for Jackie Delong!" (Morgan, D. Nov., 2000)

Standard Nine: Professionalism and professional behaviour

Other than injustice to children, nothing angers me more than unprofessional behaviour. A recent experience shows this. At a meeting with colleagues and the director, where I was not in attendance, a principal in the system criticized my performance although she had not approached me on the topic. The director recommended that she put her criticisms in print. The following e-mail was sent to the director with a copy to me. I subsequently investigated to check on the accuracy of the criticism and found it to be this person's opinion and not shared by the persons I contacted as well as those contacted by one of my colleagues.

A number of administrators were impacted by the way the whole group session was initiated. It was felt that the manner in which the questions were posed and presented was condescending and a "slap on the wrist". Having it impressed upon us that those who had access to the results had beaten themselves black and blue over the data, there was not one reference to the hard work that has been done by the principals at the schools. Nor was it recognized that we will be the people who face the public and the community reaction. Instead, many felt that it was one more time we had been told that principals are not doing their jobs.

People definitely need to feel support and backing as we face the harsh realities that the EQAO data presents to us. We are part of the system, the problem and the solution. Not only do people need some system support as to direction and focus on literacy, but they need to know we are valued and in-serviced for the work ahead.

We appreciate the opportunity to raise such concerns and will be pleased to be a part of any further dialogue that allows principals to feel they are a vital and respected part of the system.

November 22, 2000.

Further I looked back at the questions I had used in overheads for the group session, a direction that we had discussed at Executive Council. Her accusations appeared to me (and several others) to be unfounded or at least over-reactive. As Paula Rasokas says, "You ask hard questions, Jackie." They were hard questions including:

- Who should be responsible for solving this problem?
- What can we do to support you to improve literacy?
- How will you hold yourselves accountable?

- How can we help you to raise test scores?

Over the years I have learned the importance of being extremely conscious of sharing information that was not public information and of making negative comments about fellow educators. The Teaching Profession Act 13 (1) (b) prevents members of the federation from making negative comments about a fellow member and the College of Teachers rules on these behaviours under its Code of Ethics. Notwithstanding these regulations, it is behaviour that lacks integrity. Since the e-mail was sent to the director, I did not respond directly to the writer. On January 15, 2001, the principal called me requesting an opportunity to apologize. At a private meeting on January 19, 2001, she confessed to “unprofessional behaviour” and committed to me that it would not happen again. I accepted her apology.

On the positive side, the issue prompted me to check out the impact of the message at the administrators’ in-service session. I found that it had prompted a much closer analysis of the test results by principals and much more dialogue on the topic was occurring than I had observed in any other year of the test. I had several in depth discussion with principals and support staff on the meaning of the test results. Many of the presenters at the session had been contacted for follow-up sessions with school staffs. While it had not been my intention to send a message that principals were not valued, I did want to stimulate dialogue on, and attention to, the issue of low test results. I have resolved to work more closely with the schools in my family with the lowest achievement. Clearly, I don’t *avoid controversy*. (Somerville in Greenspon, 2000)

Standard Ten: Responsibility to act locally and publish globally

By producing accounts of my life as a superintendent, by making explicit my educational standards of practice in the context of this local and global standards movement (OCT, 1999; TTA, 1998), I feel that I am contributing to the knowledge base of practitioner research that will inform my work and the work of others. This work is set also in a global context because of national and provincial government agencies that seem to stifle what is important in their standards of practice. In Ontario the Ministry of Education is reinventing

the standards set by the College of Teachers (1999) because they need to be more useable which means “more measurable”. (OPSOA Meeting Nov 3, 2000) Moreover, the voices of the administrator’s are missing in the published work. (Connelly & Clandinin, 1995, Anderson & Jones, 1999) If people like myself and Sylvia Jones (Jones, 2000) don’t make the effort to publish, the academy will continue to assume that the researchers in the universities hold the only knowledge about the lives of teachers and administrators.

What are my holistic standards of practice?

By holistic standards of practice, I mean the ways in which I see myself operating which I consider my best practice – ways in which I regularly, though not always, act that appear to me to represent good educational leadership. They are standards that seem to permeate my personal and professional life and represent values that I wish to live by. I did not include them in the ten standards specific to the role of superintendent because they have an umbrella effect and frequently include and connect more than one of the ten.

Standard One: Teaching and Learning

My life has been primarily composed of various reincarnations of teaching and learning. In the years when I was more focused on one or the other, one or the other may have seemed the primary activity. I think of the years until I was 21 when I was a student and then became a teacher – there seemed to be a clearer line between the two but since then the line has been blurred. Even when it would seem that I was primarily a teacher, I have been in a learning mode whether taking courses or learning a new skill on my own. This has become even more blurred through my research. On a meta-cognitive level, as I am teaching in a forum such as the leadership program, I am thinking about what I am doing, what I am learning and how I can improve another time. It is like a constant pressure or buzz that has an energy of its own. Another example is my work with Maria. While I teach her skills such as organizing a leadership program, she teaches me efficiency in organizing computer files. Watching her grow has been a real joy for me and I have learned about my capacity to influence. More recently as an instructor teaching the Masters group I am a teacher in the more traditional meaning of the word. However, as I teach, I learn about myself and as I

articulate my experiences to demonstrate them as narratives I learn as I teach and *I am what I teach* (Drake, 1997).

In my personal life, the role of parent as teacher recurs through the lives of my children as I assist them by sharing my expertise, an expertise that they have come to value more as they grow older. I see in their responses to life the values that I hold and have encouraged in them. I have been an active volunteer in the community, for most of my life and during 2000, they were both volunteers with the United Way, an organization where I had been local president.

Standard Two: A vision of good

I have a tremendous need to contribute to making a better world. One of the attractions of action research is the commitment to improving the social order (McNiff, 1992). When I set out to make things better I have an overriding vision of what that might look like. I often underestimate the obstacles in the way because my nature is to focus on the positive and to find ways around the obstacles and solutions to the problems. While I have experienced failures, they have usually been temporary or a means to another equally good end. The successes have certainly outweighed the setbacks.

By and large my experience has been that when I set out to create a new direction, people come on board to help me get there. That positive view of the world has caused me problems in my research because my inclination is to forget the problems once they have been solved. In two of my validation group meetings (1999, 2000), the feedback has been that I forget to include the dark days in getting to a vision of good and therefore the stories become *victory narratives* (MacLure, 1995). Leaving out the means to overcome obstacles does not help others see the reality of the world of a superintendent.

The story of the amalgamation of school boards 1998-2001 has not been a victory narrative and my personal crisis of job loss, March, 1998 was truly a dark day. Nonetheless, during this time period my personal drive and need to see a better world has driven me to improve the lives of the educators taking the Masters program, the students and teachers involved in

action research projects and the recipients of the community work I do. That vision of something better sustains me in the tough times and I keeping the goal in sight maintains my commitment. There is some evidence that I am contributing to an improved social order. (McNiff, 1992). There is still much for me to do.

Standard Three: Faces of People: Family, Friends, Colleagues

At the same time that I have a vision of good, I see the faces of the people that can help bring the vision to fruition. These two standards really occur at the same time. As I described in part two, the two flow in and out together to create the proposed future state. I never see myself as carrying the flag out there by myself; it is always a vision of me working alongside a group of friends and colleagues with the same purpose in mind. I have been very fortunate that people have chosen to work with me on these projects. I think that is partly to do with the fact that I won't ask anyone to do anything that I haven't or wouldn't do. Usually my role is more front-end loaded and once the project gets going I provide less frequent intervention but still sustained support.

It is the sheer pleasure of seeing the faces of the people enjoy the work, see the improvement and experience the success that sustains my commitment and drive despite the challenges that can make the life and work temporarily disappointing. People (including the director) both at work and in my family will tell you that I push, at times, too hard. People will also tell you that I provide the supports for people to try to improve. And the pushing includes myself. On my birthday, January 27, 2001, my son gave me a card that featured a middle-aged man in a tutu addressing an elderly woman saying, "Would you quit pushing me, ma! I don't want to be a ballerina." On the inside, it said, "Birthdays are a time to take stock of your life and lay the blame on your parents." My son wrote, "I do blame you. For all the good things now coming my way. Thanks. I love you. Dean." I had encouraged him to stay in school and now he was seeing the value in that. His face beamed. I do push but I can see a better future. He could, too.

Standard Four: Flow: integrating, connecting and relating

I want my life and work to be a seemingly effortless flow. I work hard at making it appear to be so. And I recognize that it is an image that is rarely achieved in fact although frequently in appearance. When I am responsible for an event, I want it to happen without glitches so that the event is planned so that people feel valued. I feel that when meetings or workshops are well-organized people do better work because there are fewer distractions and they can concentrate on the task at hand.

I also see an important role for myself in making connections. When I am responsible for an event I help draw people together who have common interests. When I am teaching skills or knowledge I make a point of making the connections or relevance of the learning. Integration was a key principle in the writing of *The Common Curriculum* (1994).

Multi-tasking is just the way I live and act. I am rarely doing anything in isolation so one act can benefit several directions that I am working on. While I rarely work on one thing at a time and my random nature can be an asset or a liability. (DeLong & Wideman, 1997), I have the capacity to *hold together the one and the many* (Plato) at the same time. I can be very focused on a particular result while completing many other tasks. Contrary to popular belief, *the divided will* (Bateson, 1992) may be an advantage. This may be akin to the concept of the *multiplicity of selves* (Childs & Fletcher, 2000) but I don't see any change in myself only in the way that I am performing. I am, however, able to lift myself out of a situation with deliberate focusing of my thinking as evidenced in the presentations of School Accommodation Studies. (See Planing Above, 2000)

One of the strategies that I use to retain good ideas when I don't have the time to focus on them is to use a 'parking lot'. When an idea or connection occurs to me whether in my work day or when I am writing my thesis, I record the idea in a Parking Lot which may be a new document in a computer file or a note in my planner. When I have time, I go back and think about how I might use it. This action may occur many times before I actually use the idea.

Standard Five: Educative Influence

I think this is the all-embracing standard for me. If there is one expectation I have of myself, and I know there are many, the one that is the most important and significant is that I am having a positive, beneficial educative influence on people and systems. Like, Jack Whitehead (1999), I have tried in my research to understand the nature of my educative influence (DeLong, 1999). Educative influence may be the essence of educational leadership. If I am not influencing people and systems toward improvement for the purpose of improving student learning, I feel that I am not being a good leader. That influence comes from building positive, caring relationships built on mutual respect, reflective practice and commitment to continuous improvement and results.

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4. KNOWLEDGE-CREATION IN EDUCATIONAL LEADERSHIP AND ADMINISTRATION THROUGH PRACTITIONER RESEARCH.

Jack Whitehead, Department of Education, University of Bath, England.

Jackie Delong, Grand Erie District School Board, Ontario.

Presented at AERA, Seattle, 14th April, 2001

In keeping with the conference theme: What do we know? How do we know it?, the paper explains how practitioner researchers can contribute to the knowledge-base of educational leadership and administration. Jackie Delong is a superintendent of schools who is engaged in an action research enquiry into her own learning. (1995-2001). She is explicating the standards of practice and judgement which can be used to test the validity of her knowledge-claims about her educative influence. Jack Whitehead is a university academic who is researching his own supervision of Delong's research programme in relation to the creation of a thesis which demonstrates her originality of mind and critical judgement in contributing to the knowledge-base of educational leadership and administration. We have included as an Appendix the proposal we successfully submitted to AERA in August 2000 so that you can check that we are doing what we said we would do in April 2001, here in Seattle. In this proposal we focus attention on the words of David Clark in an invited address to this Division in 1997.

The honest fact is that the total contribution of Division A of AERA to the development of the empirical and theoretical knowledge base of administration and policy development is so miniscule that if all of us had devoted our professional careers to teaching and service, we would hardly have been missed. (p. 5)

As Jackie's supervisor, Jack had suggested they attend this session because its focus, on the search for authentic educational leadership in schools and universities, appeared relevant to Jackie's research. We shared our mixed emotions after the session. We felt exhilarated by his conclusion that more research was needed by practitioners into their own practice. We felt saddened by the poignancy of seeing a committed researcher looking back on his life-time's commitment to a field of educational enquiry with a feeling of some despair. We both expressed the hope that our collaboration might lead to a more hopeful conclusion!

Like McIntyre and Cole (2001) we believe that:

"Performance of the research text is an embodiment and representation of the inquiry process as well as a new process of active learning. The possibility of active learning in each performance or recreation of the text exists through our ongoing commitment to maintaining the conditions of our relationship. Each performance is an experiential basis for reflection, analysis, and learning because in relationship we are 'participants-as-collaborators' (Lincoln, 1993, p.42). Together we were able to draw out each other's knowledge and strength." (p.22)

Hence we are video-taping ourselves to help our learning to move forward as we reflect on our experience.

Our research takes place in four contexts. Jackie researches her practice as a Superintendent in the Grand Erie District Board in Ontario. Jack researches his practice as a professional educator in the University of Bath. We come together as researcher and supervisor at the University of Bath and as collaborative researchers at the American Educational Research Association.

Again we agree with McIntyre and Cole (2001, p.23) in terms of our collaborative relationship that it has developed through mutual trust, respect, and care and that the risks inherent in any collaborative self-study (Lomax, Evans, Parker and Whitehead, (1999) require particular attention to these qualities.

The developing epistemology of my practice as superintendent: Jackie's story.

I want to take you immediately into an aspect of my practice through a video-clip of a meeting in which I am receiving the assessment by the principals and vice-principals of my practice in a process of democratic accountability. I will explain the significance of this form of accountability as my story unfolds below.

The italicised paragraphs which follow are taken from a re-draft of the Abstract I worked on following a conversation Jack will be referred to later.

This story is concerned with the creation and testing of my own living theory of my learning about my educative influence as a superintendent of schools, an educational leader and insider researcher (Anderson & Herr, 1999) living in turbulent times - 1995-2001. It is a journey of professional learning and self-discovery through research-based professionalism as I ask, research and answer the question, 'How can I improve my practice as a superintendent of schools in a southern Ontario school district? (Whitehead, 1989).

It represents and demonstrates my originality of mind and critical judgment as I describe and explain my living standards of practice that can be understood through my values for which I hold myself accountable. My originality of mind is being expressed through narrative and image-based forms of communication (Prosser, 1998; Mitchell & Weber, 1999) in which I describe and explain stories of myself, a self-discovery of my need for internal and external dialogue, of how I hold together continuously in a living, dynamic way, a plurality of actions. I describe and explain my work in my many portfolios including the birth and growth of an action research movement in a school system that is restructuring amidst the impact of economic rationalist policies. (Whitty, 1997)

This story serves to focus my critical judgements on the clarification and use of the values that have emerged in my practice as I am able to construct and deconstruct the transformations that have taken place over the five years of the research and to understand what has moved me forward. The meaning of those values that I am articulating are grounded in my practice and constitute my living standards of practice and judgment in my explanations. They emerge through reading, dialogue and reflection on my experience as I account for myself in my practice by continuously moving forward while holding on to the sanctity of personal relationships and democratic evaluation within a hierarchical system and power relations.

My contribution to the scholarship of enquiry emerges from my storying and re-storying, my dialectical and dialogical processes and an analysis and synthesis through the writing of

my thesis. One of the obstacles to this clarity is that I take much of my political *nous* as natural and obvious and so embedded in the way I do my work that it has been very difficult to uncover. My process of learning, as distinctive as fingerprints, (MacBeth, J.) emerges from stories of victory and ruin (MacLure, 1996) of my various roles in the school board-senior management relationship, in my family of schools and systems portfolios and in my relationships imbued with life-affirming energy (Whitehead, 1999) and vitality (Tillich, 1952) as I educate social formations.

Given the constraints of time and space in this form of presentations I will concentrate on my commitment to values of democratic and non-hierarchical relations. and improving teaching/ learning/ schools and school systems.

Democratic and Non-Hierarchical Relations

An earlier paper on '*Continuously regenerating developmental standards of practice in teacher education: a cautionary note for the Ontario College of Teachers*' represents my response to an imposition of checklist types of performance review procedures that is contrary to my value of research-based professionalism in which teachers take responsibility for their learning and improvement. I actively encourage teachers and administrators to take control of their learning. (Barkans, MacDonald & Morgan, 1996; Black, 1997; Rasokas, 2000; Quigg, 2000)

In the Family of Schools Principals Evaluations of my Performance coordinated by two veteran principals in the families, Lorne Berry (1995-1997) and Keith Quigg (1998-2000), I wanted to learn from my principals and vice-principals what I could do to improve my practice as a superintendent through a democratic evaluation process. In addition, I want to educate social formations (Delong & Whitehead, 2000) by breaking down the hierarchical structures in the system so that principals engage their staffs in creating learning organizations (Senge, 1990) where they can learn from their teachers and teachers can share the responsibility for the learning in the classroom with their students. In the video that I directed and produced, "Improving Schools Through Action Research" (Delong & Wideman, 1997), Tom Russell said,

“there is a certain discomfort in discovering that you could have been doing something better....(He’s) always struck by how the students in a classroom can be critical friends. They seem to know what it’s safe to say to a teacher and what is not. The saddest part of teaching perhaps is when the teacher never asks at all.”

When Cheryl Black, a secondary school music teacher, presented her paper ‘*Valuing The Student Voice in Improving My Practice*’ at OERC on December 3, 1999, I felt my educative influence as she said, “This group of students and I, are partners in the learning process and I now feel accountable to them for the quality of work I do.” She was also submitting to democratic evaluation with her students and together they were creating an environment for sharing and learning:

Somewhere in the midst of our daily routine, my students have found the confidence to be honest with me, and, somewhere in the same place, I have found the courage to be honest with my students. We have all grown and been changed by our connections. Some might argue that the time we spend building relationships in our classroom would have been better spent in more structured learning, however, Glasser(1993) believes that “the better we know someone and the more we like about what we know, the harder we will work for that person.”(30) My students are demonstrating “conscience of membership”.(Green, 1985) They are accountable to each other rather than only to me. In fact, they discipline and support themselves thus creating a partnership of learning rather than a ‘teacher-down’ approach. They have improved their singing ability and learned a great deal about music, in general. However, I maintain that the ability to build honest and healthy relationships is a skill that is only developed in unique circumstances and, it is impossible for either the teacher or the learner to remain unchanged. (Black, 1999)

Commitment To Improving Teaching/ Learning/ Schools and School Systems

Even prior to my being appointed superintendent, Peter Moffatt, Director of Education, and I had shared the belief that increasing parental involvement in students learning would increase achievement. Since 1992 we had been looking for avenues to increase parental and community involvement in schools. In 1996, we published a summary of our activities designed toward 'Building a Culture of Involvement in Brant County' in ORBIT Vol. 27, No. 4 1996. I had just spent a year implementing the new School Councils and brought that recent experience to the article. Although we have written many board reports and collaborated in many projects, it was the only publication that we co-authored.

By the end of 2000, the year-long project for EQAO managed by Ron Wideman, Diane Morgan, Kathy Hallett and I *An Action Research Approach to Improving Student Learning Using Provincial Test Results* was finally submitted and approved. In it, teachers and consultants from my board and the Nipissing Parry Sound District Catholic School Board explained how they used their provincial test results to inform an investigation of ways to improve their teaching and student learning through an action research process. My role was mostly encouragement and support; my friend, Diane Morgan, now retired, was the project coordinator.

There were some important ways in which I was influential. It is important to integrate into accounts those sometimes tense and difficult experiences which are often part of projects designed to improve learning. I insisted on the questions using the "T" as essential to the process. Against some resistance from the University of Nipissing I persisted until the teachers names and photos were included with their work. On the other hand, I was not able to resist a common format to the narratives and my involvement in a separate literature search which seemed to me to be separated from the process of the enquiry. Partnerships are about give and take. The teachers' findings about effective teaching and learning strategies in their classrooms were, to me, inspirational. Several of the narratives have been published in full in Ontario Action Researcher and have been presented in the board and at OERC. The teachers recorded their belief that having gone through this process their teaching

improved, the students' learning improved and that this had a positive impact on the test results the following year. The improved test results tend to support the teachers' beliefs.

One way of improving a teaching/learning/schools and school systems is to improve the quality of the leadership. When it became evident to me that Jack's message of accreditation for action research was beginning to take root and knowing that one of the recent skills essential for being an effective school administrator is the capacity to analyze and use data to improve student achievement I created and implemented (1999-2001) the GEDSB-Brock University M.Ed. program with Susan Drake and Michael Manley-Casimir. As well Jack and I have been instructors of the program. It is mostly a victory narrative but the university as vampire (MacLure, 1996) has been at work in the ethical review process in the sense that the institutional power relations are at work in ways which could, so easily, distort the teachers' knowledge through the pressure to conform to scholarly standards of judgement which were not created from the disciplines of educational practice (Lyotard, 1984, p. . One of my priorities in this program was that the research would be conducted in our schools and improve the learning of our children. One of the students, Bob Ogilvie (2000), wrote a paper for the Reflective Practice course that Susan and I taught 'Cohort Story: Re-Searching Together' that describes their experience. In September, 2001, there will potentially be fifteen contributions to the knowledge base of teaching and learning from practitioner-researchers.

I cite my performance reviews by Peter Moffatt (1995-2001): Performance Reviews: Jacqueline D. DeLong as evidence of my influence on teaching and learning and school improvement. Peter has been a strong influence on me and been a critical friend over 19 years. I am fortunate to have a boss who shares my values and is a friend. In addition, we have written hundreds of papers, projects, proposals, reports and policies and procedures over 6 years. Some of these include:

Brant County Board Of Education: Policies and Reports:

1995: School Councils; Safe Schools

1996: Co-operative Education; Partnerships

1997: Compensatory Education; Co-operative Education

Grand Erie District School Board:

1998: EQAO Action Plan; Assessment Policy

1999: EQAO Action Plan; Career Education; Volunteer Policy

2000: EQAO Action Plan; Career Education; Communications Plan

2001: EQAO Action Plan; Leadership Programs; Staff Development

Model

One of the ways I intend to influence school systems is through my research and writing. In this paper for the 2001 Annual Meeting of AERA in Seattle, 'Knowledge-Creation in Educational Leadership and Administration Through Practitioner Research.' I want to get my insider, practitioner knowledge into the knowledge base of educational administration so that school and system leaders can see that there is no single model of how to be an effective leader but that each of us needs to develop his/her own standards of practice. I want to build the bridge that Joseph Murphy (1999) said no one is interested in building.

The supervisor's influence on DeLong's inquiry: Jack's story.

One of my pleasures in supervision is at the time when the researcher forms a clear abstract of the thesis which draws attention to the way in which the researcher's originality of mind and critical judgement have engaged with the knowledge-base of the field of inquiry. For me, the definition of what counts as a contribution to knowledge is essentially related to how the researcher's originality of mind and critical judgement has enabled questions of the kind, 'How do I improve my practice?' to be asked, researched and answered in the course of the enquiry. Because of the importance of this definition I want to focus, through a video-clip on my influence in the expression and communication of Jackie's definition of how her originality of mind and critical judgement has been expressed in the process of her knowledge-creation in educational leadership and administration.

In the video-clip I am focusing attention on my frustration in not being able to understand clearly how Jackie's Abstract is focusing on her originality of mind and critical judgement. I am saying that I feel sure that the separate components I can see in the Abstract will constitute a Ph.D. Thesis but that I can't see how Jackie has shown her readers that she is meeting standards of originality of mind and critical judgement. I want to explain my educative influence in relation to the transformations between the Abstracts.

Jackie's Abstract 9th March 2001

This thesis is a journey of professional learning, reinvention and self-discovery through research-based professionalism in asking the question, 'How do I improve my practice as a superintendent of schools in a southern Ontario school district?' It represents and demonstrates my originality of mind and critical judgment as I describe and explain my living standards of practice for which I hold myself accountable.

The values that I am articulating are grounded in my practice, in what I know from reading and dialogue, from experience and from reflecting on that experience. Through writing about my values that emerge in my practice, I am able to construct and deconstruct the transformation that has taken place over the six years of the research and to understand what has moved me forward.

Through narrative and image-based research I describe and explain the birth and growth of an action research movement in a school system that is restructuring amidst the negative pressures of market policies.

Jackie's Abstract 12th March 2001 following conversation with Jack on the morning of 12th March (see the italicised paragraphs in Jackie's story above for this Abstract).

Before I present the values I use to explain my educative influence I want to focus attention on the importance of defining the living standards of practice and judgement which can be used to test the validity of such explanations.

I want to stress the importance of pleasure in what I do. It is a pleasure for me, in my work as a supervisor of practitioner-research, to contribute to the expression, definition and communication of the living standards of practice and judgement which characterise both educational practice and claims to know such practice. Here are some moments to share on the video-clip of 20th March where I am focusing attention on Jackie's capacity to relate her embodied values of students' learning to her understanding of how to influence system responses to support students' learning.

In the lead up to this conversation, on Thursday 15th March Jackie showed me an e-mail she had received, the day before, from Carolijn Mac Neil, a teacher in the GEDSB.

"I talked to John Verbakel and I emailed Dave Abbey. Nowit was like magic!! All of a sudden I was swept up by the action research SWAT team. James Ellsworth called me and asked me to be part of a portfolio team receiving funding for action research. Several special dates were discussed where training would be given and opportunities to share with other practitioners given. Dave Abbey emailed me back with all sorts of suggestions. Lynn Abbey phoned and agreed to be my "Critical friend" or Mentor as we like to call it. John agreed to let me go on several PD days for my project. I knew that I was in a learning curve here and it is really exciting. I am going to really think things through before I meet with Lynn on Monday.

What impassions me about portfolios? I have the boxes set up in my room and each of my students have a file folder. What is the deal here? I know all I have heard from colleagues in the past is that portfolios do not work. They are a pain.. Why do I refuse to listen to this banter. Why am I so excited to try them in my academic class? Where will I start. What type of portfolio will it be? What purpose will they serve. What do I want from my students. How will the portfolios fit in naturally with the classroom work? I know one thing : I want my students to take more

responsibility for their learning. I want them to use suggestions that I give to revise reflect and modify but how does one do this? I think I will discuss some of this with Lynn."

My first response was to feel Jackie's pleasure in the affirmation she felt that her work was being appreciated and used. My second was to share the laughter about the idea of an action research SWAT team! The e-mail kept coming into my mind as having something significant to say about Jackie's system's influence. So did ideas from Edward Said (p. xii-xiii) about culture and from Bourdieu (p. 91,1992) about the habitus which influences the reproduction of social formations. My intuition began working on the idea that this e-mail was showing Jackie's *system's* influence' as having pervaded the culture of the board. I mean this in the sense that her influence was being felt through the actions of others who had been directly influenced by Jackie, in face to face communications.

In the video-clip I can be seen and heard, raising the idea of Jackie's influence on a 'system'. Jackie's story above shows has integrated in her story above, her response to the conversation in the section on commitment to improving teaching/ learning/ schools and school systems.

At this point I want to draw attention to the 'embodied' values I believe that I express in my educative relationships and which can help to explain the nature of my educative influence in the processes of knowledge-creation with Jackie and the other practitioner-researchers whose research programmes I supervise. I think my embodied values are explanatory principles because my experience of their negation is sufficient reason for me to explain my actions as I seek to live my values more fully in my practice. I think my values are the standards of practice and judgement I use in accounting to myself and others for how I live my values more fully in my practice. I am hopeful that we are both expressing in our own ways, in ways which can be further revealed in the video-tapes of our presentation, the embodied values we use to explain our educative influence. I see Jackie wanting to explain her influence in relation to her embodied knowledge as a superintendent of schools. I see me wanting to explain my influence in relation to my embodied knowledge as a

professional educator. I see us both wanting to explain our embodied knowledge as educational researchers in which we are working to contribute to the knowledge base of our vocations in education.

My embodied values as explanatory principles and standards of practice and judgement

A life-affirming faith in the embodied knowledge and knowledge-creating capacities of practitioner researchers.

As an educator, supporting the educational enquiries of practitioner-researchers I hold firmly to the view that the practitioner-researchers already embody much of the knowledge which the research can make public. In saying this I don't want to be misunderstood. I see the practitioner –researcher embodying the knowledge I want to help to make public. In the process of working on ways of communicating the embodied knowledge in enquiries of the kind, 'How do I improve what I am doing?', I see knowledge-creation at work. The way I communicate this valuing of the 'embodied knowledge' and knowledge-creating capacities of practitioner-researchers has been reflected back to me by Robyn Pound a researcher who transcribed the following from one of our conversations from 1996:

Robyn Pound - Here is an example of an affirming experience which encouraged me to give credit to my own voice. After a presentation I made during my first year, Jack Whitehead replied by saying:

'At the moment the power behind what counts as knowledge is in the academy. It is not in the form of knowing that you have. I genuinely believe that you have the form of knowledge that I am interesting in helping to make public.... If we to take the view that you are starting to work with parents of young children and that the 'knowing' they have is developmental. It's emergent, but never-the-less is actually superior to the 'knowing' that is in the academy at the moment about what you are interested in. You would have the personal and professional knowledge together (parents and me). We (the academy) would be the learners. Over a few years our task would be to learn what it is for you and your parents to become good parents with your help and support. We would be

subordinate, in terms of our learning, to the personal and professional knowledge which you and the parents actually have as you are working with the child to become better parents.’ (Taped presentation, BARG, 7.10.96).

I think that I carry this belief of mine as an ‘embodied value’ of my own which I think communicates to Jackie, and other practitioner-researchers I work with, a passionate valuing of their ‘embodied knowledge’ and ‘knowledge-creating’ capacities. With working in education I think the emotional intensity of my commitment carries the additional meaning that in creating publicly shareable knowledge, from and in their practice, they are also creating themselves. I am meaning this in the sense of exercising some originality and critical judgement in the creation of our own forms of life in our educational enquiries. This is why I value what I do in education and educational research so highly.

Communicating a life-affirming energy

In the face of the certainty of death I feel a life-affirming energy which I associate with Bataille’s idea of assenting to life up to the point of death and with Foucault’s ideas on the uses of pleasure. In my educative relationships I feel alive in a way which I believe communicates both a life-affirming energy and pleasure. I am stressing the pleasure associated with my life-affirming energy because I believe that it is crucial in explaining my educative influence in the processes of knowledge-creation with practitioner-researchers. Let me see if the words loving and creative spirit carry any meaning for you. I do believe this pleasure and energy has a spiritual ground in the experience of the state of being grasped by the power of being itself. Paul Tillich’s work on the Courage to Be, helped me to articulate this point. I don’t want to say anything more about this spiritual value, embodied in my practice. I simply want to acknowledge its presence and hope that you can feel this spiritual, life-affirming energy through my relationship with you.

Engaging with the life-affirming energy of practitioner researchers

As I engage with the life-affirming energy of others, in my educative relations, I think of education in terms of forms of enquiry through which we create our own forms of life in

relation to the certainty of death and other influences. I associate the 'giving of form' with my aesthetic values. I think of the art of living in terms of giving form to life itself and I seek to express my value-laden practices as an educator and educational researcher in a way in which you will experience as aesthetic in the sense that I can be seen to be influencing the educational development of myself and others in ways which are assisting in the creation of a form of life. When I say this I do not want to be understood as saying that I have educated anyone other than myself. Because I associate education with learning and knowledge-creation I think each individual makes sense of their own experience in a way which is uniquely their own through an engagement with their imagination and creativity. I do however think that I can claim to have an educative influence. In this presentation I am seeking to bring into my claims to educational knowledge a form of aesthetic knowing which is focused on the expression of an influence within the creative formation by another of their own form of life.

Sharing insights from passionate educational enquiries.

The practitioner-researchers I work with often comment on 'Jack's latest book'. They don't mean my own! I know that I have an enthusiasm for sharing insights from the work of others that are influencing my own enquiries. So, as I seek to share my insights with Jackie I am focusing on a creative and critical engagement with the ideas of culture from Edward Said (p, xii-xiii, 1993) and the ideas of a 'logic of practice' and the 'habitus' from Pierre Bourdieu (p.91, 1992).

As we work at improving our contributions to the knowledge-base of educational leadership and administration we want to share, in a process of democratic accountability, both our success criteria and the evidence we use to judge our success.

Jack's success criteria

We want to end our presentation by re-visiting David Clark's statement that:

The honest fact is that the total contribution of Division A of AERA to the development of the empirical and theoretical knowledge base of administration and policy development is so miniscule that if all of us had devoted our professional careers to teaching and service, we would hardly have been missed. (Clark, 1997, p. 5)

In an attempt to avoid such a retrospective analysis of one's productive life we want to offer for your evaluation the success criteria we use to judgement our own contributions to our chosen profession, education.

Jack's criteria are focused on both the reconstruction of educational theory and his educative influence in the learning of other students of education. He wants to look back on a productive life in education with the knowledge that he has contributed to the development of living forms of educational theory which can be related directly to the education of individuals and to the education of social formations. He offers as partial evidence of his success so far, the following living theory theses and dissertations from the living theory section of [actionresearch.net](http://www.actionresearch.net):

EDUCATIONAL KNOWLEDGE CREATORS **1995-2000**

Austin, T. (2001) *Treasures in the Snow: What do I know and how do I know it through my educational inquiry into my practice of community?* Ph.D. Thesis, University of Bath. In the Living Theory section of <http://www.actionresearch.net>

Adler-Collins, J. (2000) *A Scholarship of Enquiry*, M.A. dissertation, University of Bath.

Cunningham, B. (1999) *How do I come to know my spirituality as I create my own living educational theory?* Ph.D. Thesis, University of Bath.

D'Arcy, P. (1998) *The Whole Story.....* Ph.D. Thesis, University of Bath
Eames, K. (1995) *How do I, as a teacher and educational action-researcher, describe and explain the nature of my professional knowledge?* Ph.D. Thesis, University of Bath

Finnegan, (2000) *How do I create my own educational theory as an action researcher and as a teacher?* Ph.D. submission, University of Bath, under examination.

Holley, E. (1997) *How do I as a teacher-researcher contribute to the development of a living educational theory through an exploration of my values in my professional practice?*

M.Phil., University of Bath. Hughes, J. (1996) *Action planning and assessment in guidance contexts: how can I understand and support these processes while working with colleagues in further education colleges and career service provision in Avon*. Ph.D. Thesis, University of Bath.

Laidlaw, M. (1996) *How can I create my own living educational theory as I offer you an account of my educational development?* Ph.D. thesis, University of Bath.

Loftus, J. (1999) *An action enquiry into the marketing of an established first school in its transition to full primary status*. Ph.D. thesis, Kingston University. Evans, M. (1995) *An action research enquiry into reflection in action as part of my role as a deputy headteacher*. Ph.D., Kingston University

Whitehead, J. (1999) *How do I improve my practice? Creating a discipline of education through educational enquiry*. Ph.D. University of Bath.

Jackie's success criteria

I judge my success on my capacity to live my life according to my values which are my standards of practice and judgment. As I attempt to share my embodied knowledge with clarity and elegance, I find that they are still emerging through the writing of the thesis: the sanctity of personal relationships, the focus on children, democratic and non-hierarchical relations, commitment to improving teaching / learning /schools and school systems, encouraging practitioner knowledge through action research, and professional accountability. And, as I have written every year in my goal package: Finding the meaning of balance. I do not want to end my professional life feeling as David Clark did; I do wish to contribute to improving the social order. (McNiff, 1992)

What is the evidential base that I am living these standards of practice and judgment? First, the answer lies in the data archive of the five years of research that describes and explains the knowledge embodied in my practice. Second, the evidence that the meanings of the standards have emerged through my practice is in my draft Ph.D. submission to the University of Bath. It is my hope that this Ph.D. Thesis can join those in the living theory section of actionresearch.net – soon!

PART B: ORGANIZATIONAL CHARTS

1. SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES SEPT-DEC. 1998.

GRAND ERIE DISTRICT SCHOOL BOARD

SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES September/December 1998

	C. K. Armstrong Superintendent of Schools	J. D. Delong Superintendent of Schools	D. G. Dunnigan Superintendent of Schools	J. L. Grant Superintendent of Schools
F A M I L Y	BURFORD/ WATERFORD C. Lefebvre	DELHI/NORFOLK/SIMCOE /GELA S. Munroe-Chanda	CAYUGA/DUNNVILLE/ HAGERSVILLE/PORT DOVER J. McQuillan	B.C.I./TTSC/ NPCVS J. Scott
S Y S T E M	<u>HUMAN RESOURCES SERVICES</u> Staffing Collective Agreements Contacts & Negotiations Interviews & Selection Process Human Resource Services Abuse/Harassment & Intimidation Investigation Occupational Health & Safety Teacher Transfers Timetabling In-service - Hiring/ Selection, Performance Evaluation Attendance Management (Staff) Freedom of Information Employment Equity Non-Teaching Staff Certification Programs	<u>ASSESSMENT/STAFF DEVEL. & COMMUNITY RELATIONS</u> Assessment & Reporting Early & Ongoing Identification Evaluation & Promotion Provincial Testing Reporting to Parents Career Education Cooperative Education Ont. Youth Apprenticeship Program Trades Training Liaison Compensatory Education Continuing & Alternative Ed. Staff Development Model Leadership Training Orientation for New Employees District P.D. activities Models for Parental/ Community Involvement Volunteer Recruitment & Training Partnerships Education Week	<u>CURRICULUM SERVICES & TEACHER DEVELOPMENT</u> Curriculum Policy Program Council Program RDI System Program Initiatives System Curriculum Teams ESL Day School French as a Second Language Native as a Second Language Liaison with Native Advisory Council Enrichment Early Literacy JK/K Registrations Teacher Professional Development Course & Textbook Approval Contest Requests Student Presentations to Board Guidance Programs	<u>PLANNING & INFORM- ATION TECHNOLOGY SERVICES</u> Technology for Learners: Infusion & Computer Plans Use of Computers & Internet Copyright and Licences Software Audits Technology Innovations Design Tech/Fam. Studies Staff Training Administrative: Information Services Software applications & upgrades-Comm./ Bus./HR Planning Model Planning & Procedures Council Enrolment Projections & School Boundaries Classroom Spaces System Areas of Emphasis School Year Calendar School Improvement Plans

SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES

September/December, 1998

W. R. THOMAS Superintendent of Schools	G. S. Kuckyt	J. G. Townsend Sept.-Dec.	P. C. Mof
CALEDONIA/ PAULINE JOHNSON/ SPRUCEDALE K. Waite	SUPERINTENDENT OF BUSINESS & TREASURER B. Headon	ASSOCIATE DIRECTOR J. Boule PARIS FAMILY C. Lefebvre	DIRECTOR EDUCATION SECRETARY W.
<u>SPECIAL EDUCATION SERVICES & STUDENT SUPPORT SERVICES</u> Special Education Model Identification, Placement & Review (IPRC) S.E.A.C. Liaison Guidance Counselling Individual Student Assessment System Special Education Classes Allocate Ed. Assistants Applications to Provincial Schools Individual Education Plans Standards for Student Support Services Violence Free Schools Program Child Abuse Protocol Health Unit Liaison Student Attendance Management - S.A.L.E.P. - Home Schooling	<u>BUSINESS & FINANCIAL SERVICES</u> Business Functions: - Finance/Accounting/ Payroll - Budget/Purchasing - Transportation - Facility Services Service & Business Contracts Benefit Plans Insurance Contracts Business Partnerships Acquisitions/Disposal of Sites Five Year Capital/ Renewal Program Inventories Board Archives Education Centre Tuition Agreements	<u>PLANNING AND PROGRAM</u> Student Presentations - Board Administrative Council Transition - Program Council - Planning & Procedures Council Requests for Contests Learning Materials - Purchase plans - Board brochure - School visits - JK Implementation Plan - Review of Outdoor Education	<u>SYSTEM OPERATION</u> Secretary to Board Board Agendas, Board Records Policy Recommendation And Procedure Correspondence Administrative Council - Executive System Direction Central Filing System Contract Administration Communications Director's Newsletter Annual Report Student Admission (Non-resident) Scholarships Requests for Citizenship Trustee Orientation

2. SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES SEPT. 1999.

GRAND ERIE DISTRICT SCHOOL BOARD

SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES

September 1999

	W. K. Bell Superintendent of Schools	J. D. Delong Superintendent of Schools	D. G. Dunnigan Superintendent of Schools	J. L. Grant Superintendent of Schools
F A M I L Y	BURFORD/PARIS/ WATERFORD Chris Lefebvre	DELHI/NORFOLK/SIMCOE/ GELA Sue Munroe-Chanda	CAYUGA/DUNNVILLE/ HAGERSVILLE /PORT DOVER Joan McQuillen	B.C.I./TTSC/NPCV Jennifer S
S Y S T E M	<u>HUMAN RESOURCE SERVICES</u> Staffing Collective Agreements Contracts & Negotiations Interviews & Selection Process Human Resources Services Abuse/Harassment & Intimidation Investigation Occupational Health & Safety Teacher Transfers Timetabling In-service - Hiring/Selection, Performance Evaluation Attendance Management (Staff) Freedom of Information Employment Equity Non-Teaching Staff Certification Programs	<u>ASSESSMENT/COMMUNITY RELATIONS & CAREER DEVELOPMENT</u> Assessment & Reporting Early & Ongoing Identification Evaluation & Promotions Provincial Testing Reporting to Parents Career Education Cooperative Education Ont. Youth Apprenticeship Prog. Trades Training Liaison Compensatory Education Continuing & Alternative Ed. Staff Development Model Leadership Training Programs Orientation for New Employees District P.D. activities Models for Parental/Community Involvement School Council Liaison Volunteer Recruitment & Train. Partnerships Education Week Classroom Research	<u>CURRICULUM SERVICES & TEACHER DEVELOPMENT</u> Curriculum Policy Program Council Program RDI System Program Initiatives System Curriculum Teams French as a Second Language Native as a Second Language Liaison with Native Advisory Council Enrichment Early Literacy JK/K Registration Notices Teacher Professional Development Course & Textbook Approval Contest Requests Student Presentations to Board Guidance Programs Violence Free/Safe Schools Programs	<u>PLANNING & INFORMATION TECHNOLOGY SERVICES</u> Technology for Learners Computer Plans Computer & Internet U: Copyright and licenses Software Audits Technology Inservice Design Tech./Fam. Stuc Staff Training Administrative Technolo Information Services Software applications Planning Model Planning & Procedures Council Initiative Process System Areas of Emphas School Improvement Pla Enrolment Forecasts & School Boundaries Classroom Spaces – Plan Magnet Programs School Year Calendar Media Services

Grand Erie District School Board
SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES
September 1999

W. R. Thomas Superintendent of Schools	G. S. Kuckyt	P. C. Moffatt
CALEDONIA/PAULINE JOHNSON/SPRUCEDALE	SUPERINTENDENT OF BUSINESS & TREASURER	DIRECTOR OF EDUCATION & SECRETARY
Kim Waite	Bev Headon	Wendy Hibbard Jeanne Boule
<u>SPECIAL EDUCATION SERVICES & STUDENT SUPPORT SERVICES</u> Special Education Model Identification, Placement & Review (IPRC) S.E.A.C. Liaison Guidance Counselling Individual Student Assess. System Special Ed. classes Ed. Assistants Assignment Applications to Prov. Schools Individual Education Plans Standards for Student Support Services - Assessments - Speech - Behaviour Violence Free/Safe Schools Policy ESL Day School Child Abuse Protocol Health Unit Liaison Student Attendance Management - SALEP - Home Schooling - Home Instruction	<u>BUSINESS & FINANCIAL SERVICES</u> Business Functions: -Finance/Accounting/Payroll -Budget/Purchasing -Transportation -Facility Services Service & Business Contracts Benefit Plans Insurance Contracts Business Partnerships Acquisition/Disposal of Sites Accommodations Plan (Facilities) Inventories Board Archives Education Centre Tuition Agreements	<u>SYSTEM OPERATIONS</u> Secretary to Board Board Agendas, Minutes Board Records/FOI Policy Recommendations & Procedures Correspondence Administrative Council - Executive System Directions Central Filing System Contracts Communications Director's Newsletter/Report Accommodations Plan Student Admissions (Non- resident) Scholarships Requests for Circulation Trustee Orientation Website Content Integrated Database Safe Schools Project Management

3. SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES JAN., 2000.

GRAND ERIE DISTRICT SCHOOL BOARD

SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES

January 2000

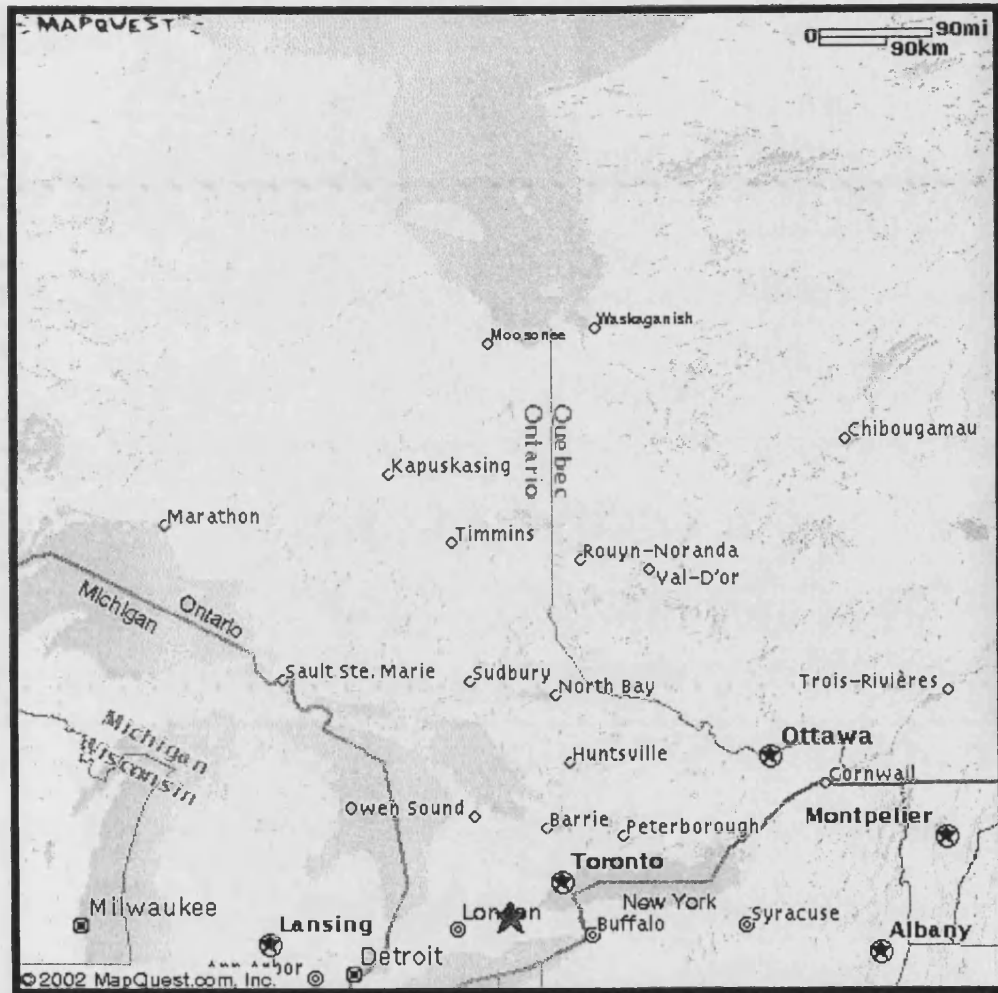
	G. M. Anderson	W. K. Bell	J. D. Delong	D. G. Dunnigan
F A M I L Y	BCI/TTSC/NPCVS J. Scott	BURFORD/PARIS/ WATERFORD C. Lefebvre	DELHI/NORFOLK/ SIMCOE/GELA/ SPRUCEDALE S. Munroe-Chanda	CAYUGA/DUNN- VILLE/ HAGERSVILLE/ PT. DOVER J. McQuillen
S Y S T E M	<u>Planning, Accommodations & Parental Involvement</u> <u>Planning Model</u> Planning Council (Chair) Areas of Emphasis School Improvement Plans Educational Change Fund School Year Calendar <u>Accommodations</u> Enrolment Figures Projections Boundaries Classroom Space KP Admissions (Out of Area) <u>Community Relations</u> School Council Liaison Parental Involvement Volunteers Education Week <u>Safe Schools</u> Policy Violence-Free Inclusive Schools <u>Programs</u> Design Tech/TIS/Family Studies <u>Brantford S.S.C. - T.R.C.</u> Supervision	<u>Human Resources Services</u> <u>Human Resources Services</u> Staffing Staffing Projections Collective Agreements Contracts & Negotiations Interview & Selection Investigation of Abuse, Harassment & Intimidation Occupational Health & Safety Staff Transfers Attendance Management (Staff) Employment Equity Performance Review <u>Staff Development</u> Hiring/Selection Performance Evaluation Disciplinary Practices Staff Certification (First Aid) Attendance Management (Staff)	<u>Assessment, Careers & Communications</u> <u>Assessment</u> Assessment Techniques Reporting Early & On-going Identification Provincial Assessment Results Promotion <u>Career Education</u> Cooperative Education OYAP Magnet Programs Trades & Training Liaison Partnerships <u>Staff Development</u> Corporate Model Orientation for New Employees District PD Non-Teaching Classroom Research <u>Leadership & Career</u> School Leadership Program Building Capacity AQ & Master's Programs GrEAT New Administrators <u>Communications</u> System Plan Communications in-service <u>Simcoe S.S.C.</u> Supervision	<u>Curriculum Services & Teacher Development</u> <u>Curriculum Services</u> Curriculum Policy Program Council (Chair) Program R.D.I. System Initiatives System Curriculum Teams French as a Second Language Native as a Second Language Native Advisory Council Enrichment Early Literacy KP Registrations Learning Materials & Media Contest Requests Student Presentations Guidance Programs Teacher Advisor Groups Safety Programs (Students) <u>Teacher Development</u> Curriculum Training Integration of Technology <u>Cayuga S.S.C.</u> Supervision

SUMMARY OF SENIOR ADMINISTRATIVE RESPONSIBILITIES

January 2000

W. R. Thomas	G. S. Kuckyt	P. C. Moff
CALEDONIA/PAULINE JOHNSON	SUPERINTENDENT OF BUSINESS & TREASURER	DIRECTOR OF EDUCATION & SECRETARY
K. Waite	B. Headon	
<u>Special Education & Student Support Services</u> <u>Special Education</u> Model Identification, Placement & Review (IPRC) S.E.A.C. Liaison Individual Student Assessment System Special Education Classes Educational Assistants Applications to Provincial Schools Individual Education Plans <u>Student Support Services</u> Standards for Assessments Standards for Speech Services Standards for Behaviour Services Child Abuse Protocols Health Unit Liaison Liaison with Community Services Attendance Procedures S.A.L.E.P. Home Schooling Home Instruction Student Welfare Procedures Ontario Student Records	<u>Business, Information & Facilities Services</u> <u>Business Services</u> Finance - Investments, Borrowing Payroll & Accounting Budget Purchasing & Disposal Transportation Service & Business Contracts Benefit Plans Insurance Inventories & Archives Trust Funds Business Partnerships <u>Accommodation & Facilities</u> Facilities Services Property Management (Sites) Accommodations Plan Energy Agreements Facilities Renewal <u>Information Technology</u> WAN & Internet Administrative Technology Network Development Software Applications & Licences Staff Development - Technology E-mail & Telephone <u>Education Centre</u> Supervision	<u>System Operations</u> <u>Board Operations</u> Secretary Agendas Policy Recommendation Correspondence Orientation & Training <u>Administrative Council</u> Executive Council C Goals System <u>Central Operations</u> Requests for S Central Record Student Administration S Accommodations Plan Project Management Staff Information <u>Communications</u> An News Release Web Integration

**Location of Grand Erie District School Board
In Ontario**



Grand Erie District School Board

Education Centre

349 Erie Avenue, Brantford N3T 5V3

519-756-6301

519-756-9181 (fax)

FACT SHEET

The Grand Erie District School Board is a medium sized school board in the province of Ontario. It encompasses an area of 4,108 sq. km. in south-central Ontario and encompasses the City of Brantford and the Counties of Brant, Haldimand and Norfolk. Major cities and towns are: Brantford, Caledonia, Cayuga, Delhi, Dunnville, Hagersville, Paris, Port Dover, Simcoe and Waterford. The area's population is approximately 214,000.

MISSION STATEMENT

The Grand Erie District School Board is a partnership of proud and unique communities. Our mission is to nurture and develop the potential of all students by providing meaningful learning experiences.

VISION STATEMENT

The Grand Erie District School Board respects the individuality of all students in their pursuit of knowledge, skill and values to become productive citizens.

NUMBER OF SCHOOLS

Elementary

JK-2	2
JK-4	2
JK-5	5
JK-6	16
JK-7	3
JK-8	40
1-8	1
2-8	1
3-6	1
4-8	1
5-8	1
6-8	3
7-8	3
French Immersion (JK-8)	2
Enrichment	1
Total	82

Secondary

High Schools	16
Magnet High Schools	1
Alternative Schools/Programs	2
Schools with Daycare Space	6

STUDENTS

Elementary (FTE)	19,666
Secondary	12,170
Special Education designated*	3,700
ESL designated*	100
Native as a Second Language*	60

* included in elementary and secondary enrolments

STAFF

School

Elementary teachers (FTE)	1,110
Secondary teachers (FTE)	813
Support (FTE)*	648
Principals	77
Vice Principals	48

* includes educational assistants, clerical and maintenance staff

Board

Supervisory officers	7
Managers, supervisors & coordinators*	18.5
Consultants and resource teachers	19.5
Support **	149

* includes responsibility for staff or departments

** includes clerical, maintenance and professional support services

GOVERNANCE

Number of trustees	10
Number of student trustees	2
Number of native trustees	1

BUDGET

Total Budget	\$207,440,391
Classroom Instruction	\$133 million

PART C POLICIES AND PROCEDURES

1. STAFF DEVELOPMENT MODEL, POLICIES AND PROCEDURES

Grand Erie District School Board Staff Development Model

Board Mission Statement

The Grand Erie District School Board is a partnership of proud and unique communities. Our mission is to nurture and develop the potential of all students by providing meaningful learning experiences.

Board Vision Statement

The Grand Erie District School Board respects the individuality of all students in their pursuit of knowledge, skills and values to become productive citizens.

Definition of Staff Development

The process by which employees develop their knowledge and skills to become more effective in their workplace responsibilities and professional roles.

E-Centre Training

E-centre is a web-based database program developed by CoreSolutions in association with the Hamilton-Wentworth DSB. It includes three components, a resource database, an inservice database and calendar. The resource database allows the board to post links to any documents, forms or web resources that are in electronic form. These include things such as policy documents, web sites, inservices, curriculum units and documents and forms. The inservice database allows users to search and browse through a list of workshops and courses offered by the board. The system manages registrations automatically, and includes a waiting list that automatically informs users when spaces become available in the inservice. The system is linked to the board's email systems, and allows instructors of courses to communicate with attendees at inservices. Evaluations and certificates can also be

handled by the system. The system also keeps track of all personal development opportunities undertaken by users, provided they signed up for them through E-centre. The calendar portion of the database lists inservices and other events such as meetings organized by date. All portions of the database are fully searchable in a number of ways

Components

The Grand Erie District School Board believes in three main components of Staff Development:

- A. **Professional Development**
-programs that are designed to enhance job performance;
- B. **Career Development**
programs that assist employees to prepare for leadership and positions of increased responsibility;
- C. **Personal Development**
activities that enhance well-being and reflect personal interests.

Staff development activities reflect all three components.



Assumptions

1. The Board is committed to providing staff development activities for employees to encourage growth and improvement
2. The Board supports self-directed staff development which encourages reflection, innovation, and risk taking.
3. Staff require training to keep up-to-date in their field because of on-going change.
4. Professional development and Career development are the shared responsibility of the employer and the employee. Personal development is the responsibility of the employee.
5. Effective staff development improves job satisfaction and efficiency.
6. Funding for staff development is limited by the funding formula.

7. Partnerships with other groups and organizations enhance staff development opportunities.
8. The Board's Areas of Emphasis will be reflected in staff development sessions.
9. Geographical size within our board must be considered when choosing sessions for staff development.

Guiding Principles

1. Staff development is a process consisting of three key elements: professional development, career development and personal development.
2. In-service needs to be on-going and accessible.
3. There must be a follow-up and sustained support for staff development initiatives.
4. Sessions need to be meaningful and relevant for adult participants and include dialogue, interaction, application and reflection.
5. Opportunities for dialogue, research, sharing of ideas and networking are important staff development strategies.
6. Self-assessment and self-direction are essential for effective staff development.
7. Participants in staff development sessions should be given the opportunity to evaluate sessions.
8. Planning for staff development should incorporate participant feedback to provide direction for future sessions.
9. When appropriate, various employee groups should be included together in staff development sessions.
10. Available technologies should be accessed to assist in staff development activities.
11. Staff are encouraged to bring forward unique and innovative ideas to enhance the delivery of staff development.
12. Staff development should recognize and celebrate the skills, expertise and accomplishments of employees.

Strategies for Conducting Effective Staff Development

1. Provide opportunity for dialogue. Groups should be clustered for a common interest and to facilitate more dialogue.

2. Keep the Board's Area of Emphasis in mind when planning staff development sessions.
3. Include a variety of activities which appeal to multiple intelligence's.
4. Include content and expectations that are workable, worthwhile, and achievable. Instructors should use step-by step instructions, relevant modeling, authentic exemplars and practical samples.
5. Use S.M.A.R.T. (specific, measurable, attainable, relevant and timely).
6. Encourage cross paneling discussions to bridge topics whenever possible.
7. Encourage collaborative work among staff.
8. Necessary logistics that help with workshops, training, and implementation include: using a variety of times and places *identifying mentors, leadership and expertise as support taking into account mileage and time parameters for participants *food, refreshments and resources revisiting to follow up
9. Encourage and support action research to improve practice.

*Keep it SHORT, SHARP, SHINY

LEADERSHIP 2201-2002

Leadership & Action Research Programs

The Grand Erie District School Board is committed to the recruitment, training, selection and support of exemplary educational leaders focused on the enhancement of the quality of student learning.

Leadership development is multi-faceted and cannot be captured in a model. The programs that are recommended are not mandatory for advancement. Executive Council, Principal/Vice Principal Organizations and the leaders of the various programs are committed to the following programs:

LEADERSHIP 2001 / 2002 PROGRAMS

NEW PRINCIPALS & VICE PRINCIPALS

Contact: Bob Almas / Terry Sonnenberg

- ⇒ Sessions that target new Principals and Vice Principals in the system

GRAND ERIE ADMINISTRATIVE TEAM (GrEAT)

Contact: Heather Gross

- ⇒ Three to four in-service sessions a year are provided to practising school administrators

Gr.E.A.T. CONFERENCE

Contact: Tilly Jilderda

An annual conference is organized for practising school administrators and system managers

COVEY WORKSHOPS

Contact: Don Backus

- ⇒ Workshops on planning and priority-setting are available to teaching and non-teaching staff and administrators

MENTORSHIP PROGRAM

Contact: Dave Pyper

- ⇒ To assist new administrators with career planning
- ⇒ To provide further support for graduates of Leadership Preparation Programs
- ⇒ To support mentoring and encourage job shadowing
- ⇒ Pilot project (January – July 2001)

MASTERS IN EDUCATION PROGRAM

Contact: Jackie DeLong

- ⇒ Brock University and Grand Erie District School Board Pilot Partnership Project (1999-2001)
- ⇒ Future M.Ed. & Ph.D. programs under negotiation

PRINCIPALS QUALIFICATION COURSES

Parts 1 & 2 – July 9 – 27, 2001

Contact: Dave Pyper

- ⇒ Provided by Ontario Principals' Council

ACTION RESEARCH TEAMS:

- Brant Action Research Network (BARN)
Contact: Cheryl Black, Heather Knill-Griesser
- Cayuga Action Research Team (CART)
Contact: Karen McDonald
- Simcoe Action Research Team (SART)
Contact: Paula Sue Rasokas
- Secondary Teachers Action Research (STAR)
Contact: DaveAbbey

BARN, CART, SART AND STAR are support networks for staff interested in conducting Action Research projects. For more information, contact one of the above listed individuals.

LEADERSHIP 2001 / 2002 PROGRAM (L2K)

Contact: Ruth Mills

- ⇒ For staff with Principal Qualifications *or*
- ⇒ Those who are registered in Part 1 or Part 2 of a Principals' Course *or*
- ⇒ Those who are interested in leadership positions within the next 3-5 years

The Leadership 2001 (L2K) Program is a program developed to assist new and aspiring Administrators in their role. The program consists of three Modules; each Module is four nights in duration from 4:30 pm until 7:30 pm (supper is provided). A program outline is provided below:

Module #1: Communications & Building Relationships

Sessions held on:

September 12 & 26 and October 10/24

Module Leaders: Marion Remen, Dave Pyper, Marion Dowds

Module #2: Curriculum, Assessment & Special Education

Sessions held on:

November 7 & 21, December , 2001 January 16, 2002

Module Leaders: Peter Rasokas and Ruth Mills

Module #3: Legal Issues

Sessions held on:

January 30, February 13 & 27, March 20, 2002

Module Leaders: Joann Alho, Donna McArthur, Andy Nesbitt

Location of Modules: T.B.A.

There will be no cost to the individual to participate in this program.

The format for the evenings will be as follows:

- ♦ one-third lecture; two-thirds application
- ♦ emphasis on case studies, in-basket and panel discussions
- ♦ use of rubrics and reflective practice encouraged

If you are interested in attending Modules 1, 2 or 3, **please register using E-CENTRE**

Contact person - Deanne Osborne, Training & Development Officer

GroupWise @ trgdev_officer@gedsb.net / fax 519-756-9181 / phone 519-756 6306
ext. 152

Essential Preparation Criteria for School Administrator Positions:

Creativity, enthusiasm, initiative, calculated risk-taking are important traits for School Administrators. Honesty, integrity, loyalty, dedication and proper qualifications for the position are assumed. A variety of different educational experiences is desirable to develop perspective.

- Planning effectively to achieve an articulated vision of education
- Communicating effectively through listening, speaking and writing
- Implementing and reviewing a school program
- Assessing, evaluating and reporting student progress in useful and creative ways
- Involving community partners in schools in ways that promote student learning
- Providing effective staff development for other staff members
- Implementing effective, positive and appropriate student discipline practices
- Developing and maintaining positive relationships among various groups, for a common purpose
- Demonstrating effective problem solving skills (issue framing, de-escalation, alternative generation, resolution and follow-up)
- Supervising staff in professional growth, improvement, and discipline situations
- Demonstrating effective management skills
- Using computer technology effectively
- Demonstrating effective self-assessment in enhancing the quality of

student learning

Management, remember, is clearly different from leadership. Leadership is primarily a high powered right brain activity. It's more of an art; it's based on a philosophy. You have to ask the ultimate questions of life when you're dealing with personal leadership issues.

But once you have dealt with those issues, once you have resolved them, you then have to manage yourself effectively to create a life congruent with your answers...Management is the breaking down, the analysis, the sequencing, the specific application, the time-bound left-brain aspect of effective self-government."

- Stephen Covey (1989)

2. EQAO INTERIM REPORT

GRAND ERIE DISTRICT SCHOOL BOARD

C-3-A

Office of the Director of Education

To the Chair and Members of June 18, 2001
the Grand Erie District School Board

Re: **EQAO Interim Report**

1.0 Background

- 1.1 Each year Program and Assessment inform the Board of the process schools use to administer the Grades 3 and 6 EQAO tests.
- 1.2 This report continues the practice of communication to the Board about EQAO:
 - in November when EQAO results and analysis are shared
 - in March when the Board Action Plan is approved, and
 - in June when an update of the EQAO test process, of the School Action Plans, and related research is presented

Additional Information

- 2.1 This report includes background, sample questions, and concerns generated by the EQAO Grade 3 and 6 test, May, 2001.
- 2.2 This report includes a focus group survey of administrators about the use of

School Action Plans prepared by March 1, 2001 and comments about the EQAO tests.

- 2.3 This report includes an update of the Action Research and Educational Change Fund projects conducted during 2000-2001 and connected to the EQAO testing of Grades 3 and 6.

3.0 **Recommendation**

- 3.1 THAT the Grand Erie District School receive the **EQAO Interim Report**, as contained in Enclosure C-3-A, dated June 18, 2001, as information.

Respectfully submitted,

Jacqueline D. Delong
Superintendent of Schools
Peter C. Moffatt
Director of Education

EQAO INTERIM REPORT JUNE 18, 2001

1.0 EQAO Testing 2001, Grades 3 and 6: Background, Questions and Comments

- 1.1 EQAO testing in the schools involves energy and effort all year. In **May**, schools test Grade 3 and 6 students using the EQAO format. In **October**, those results are communicated to the schools and school board. The results are analysed and action plans developed for the Board and schools in **February**. They are then shared with the school communities by **April**.
- 1.2 From **September through May**, schools, parents and support staff engage in workshops, revise School Action Plans, use EQAO sample units, engage in training and in-services connected to the test and conduct Action Research projects to improve student learning.
- 1.3 There were several Action Research projects connected to EQAO which involved **18 people directly and 9 schools**.
- 1.4 **2,039 Grade 3 and 2,252 Grade 6** students in Grand Erie were eligible to take the EQAO tests. Ontario spends approximately \$9,000,000 yearly for this test (*ETFO, May, 2001*).
- 1.5 Once again, the theme for Grade 3 was **Change** and this year the story was

about *recycling*. Once again, the theme for Grade 6 was **Perspectives** and this year the story was about *meteorites*.

- 1.6 For a sample Grade 3 question on symmetry and a sample Grade 6 question on transformation see *Appendices 1 and 2*.
- 1.7 There were **four multiple choice booklets** this year and each class was assigned a different one.
- 1.8 The **Home Questionnaire** was withdrawn at the last moment this year as part of the exercise.
- 1.9 Principals were asked to forward some comments from students and teachers about the testing. **Samples of student comments** were:
 - “Can we start doing bell work, math, and journals again, please.”
 - “They weren’t real math questions.”
 - “I liked it because it was challenging.”
 - “I found it hard to explain everything; my hand got tired.”
 - “There shouldn’t be so many booklets.”
- 1.10 Some **samples of teachers’ comments** were:
 - “It’s a lot of paper and money spent.”
 - “It is difficult not to take it personally when you watch students floundering with material you know you have covered well; knowing that a few simple words of explanation would help them through.”
 - “This test seemed to evaluate intelligence rather than how well the students were taught.”
- 1.11 Some other issues and **concerns** that occurred in the schools were:

- A few teachers did not use the EQAO sample units because they felt it would take too much paper.
- EQAO ruled that students could not be suspended during the test, a ruling which was quickly rescinded as going beyond their mandate.
- Although it states in the *EQAO Parent's Handbook, 2001*, pg. 13, that by law parents must have their child attend school for EQAO testing, the school has no recourse to enforce the 'law'. If a parent keeps their child away for any reason, it counts against the school in the Method 1 report for all students.
- EQAO used four multiple choice questionnaires this year instead of one. Not all were equal: one had a math expectation from Grade 7; an educator ranked the reading level of the articles at Grade 7-Grade 9 difficulty; and, one had to answer 26 questions in twenty-five minutes!

2.0 Focus Group and School Action Plans

2.1 A focus group of 10 randomly chosen elementary principals received a questionnaire requesting feedback on the test process and experience. Their responses showed:

- over half the schools are using board plans to help with development
- the 'whole school' approach is increasing
- involving parents varies from informing through newsletters to actual input by school councils
- most reviews and revisions will occur after test results are known
- most of the problems in administration are connected to accommodations, split grades and support staff to cover needs
- the system support was helpful, especially the new template, earlier in-service, information updates, new data analysis guideline and the round table discussions format
- using the anchor booklets, exemplars, requesting support staff in-service on assessment topics, supporting research projects and providing more division meetings were all mentioned as 'next steps'
- the test was administered easily and smoothly

2.2 Schools noted some next steps for improvement:

- more schools must involve parents and school councils and include schedules and agendas to increase involvement
- more schools must be more specific in next steps, evidence as indicators, time lines and include who is accountable
- support staff will assist in data analysis and professional development as requested

3.0 Research Projects Connected to EQAO through the Educational Change Fund

- 3.1 There were 12 Action Research projects connected to EQAO and student improvement. These teachers were supported with 5 release days for professional development, resources and support staff to assist with the research, analysis and reports. The projects were as follows: (See *Appendix 3, Action Research Summaries*, for more details)
- Onondaga-Brant Public School and Woodman-Cainsville Public School on developing a school community approach to EQAO testing (Janet Rubas, Sue MacNeil and Brenda Hunt)
 - Delhi Public School and Northview-Parkview Public Schools on the assessment strategies of portfolios to assist with reasoning and communication (James Ellsworth, Lynn Abbey, Linda Miller with Cindy Mels, Lyn-Anne Nash-Dertinger, and Anita Ricker)
 - Branlyn Community Public School and Cedarland Public School on student-led conferencing as an assessment strategy (Diane Morgan with Lesley Boudreault, Todd Bannister and Deb Kekewich)
 - Branlyn Community Public School on using EQAO data to improve student learning (Diane Morgan with Joanna Finch and Sue Young)
 - Pauline Johnson C. & V.S. and Delhi District S.S. on the portfolio as an assessment strategy (James Ellsworth with Neal Stamer and Carolyn MacNeil)
- 3.2 Presentations of GEDSB research have been made at Professional Development sessions, Summer Institute workshops and Action Research conferences to promote local knowledge about EQAO.
- 3.3 GEDSB research is published in the EQAO research project, *An Action Research Approach to Improving Student Learning Using Provincial Test Results, February, 2001.*
- 3.4 A committee is producing a resource booklet, *Action Research in Grand Erie, 2000-2001, Fall 2001*, on research projects and the base of local knowledge developed in Grand Erie connected to EQAO and assessment.

Action Research Summaries

Appendix 3

General Findings Summary:

There were several findings in general that the researchers found:

- Portfolios and student-led conferencing are assessment strategies that can improve student learning.
- Parental involvement is crucial to improving student learning.

- Corrective feedback and scaffolding of skill sets leading to independent student achievement.
- With few exceptions, student achievement improved dramatically throughout the year.
- Pairs working in a school or the whole school commitment improve the long lasting nature of integrated change.
- With time and development of the portfolio strategy, student motivation improves through reflection sheets, corrective feedback, empowerment for their ownership of choices, and dialogue.
- It is necessary to have oral discussion for reflection and goal-setting but follow it with written thoughts in journal format.
- A portfolio can demonstrate growth and progress through evidence and reflection.
- Rubrics help with self-assessment and with setting more specific reflections and goals.
- Portfolios and Student-Led Conferencing help develop articulation and is an excellent tool to evaluate all the Achievement Chart categories
- EQAO results help teachers focus on specific student improvement; i.e., communication, reasoning skills, and parental involvement.

Action Research Comments, June 2001

Several comments by students and teacher/researchers help to illustrate the findings:

- “Instead of the usual question, ‘what did you do in school this week?’ and the usual answer, ‘nothing much’, we get a more thorough outline of what Chris is learning, and there have been quite a few topics that opened up more for discussion. It also keeps Chris thinking about what he has done and what he has learned.” (parents of student, Chris, 2001)
- “Yet another student chose incomplete homework to place in his portfolio saying, ‘It will remind me to do my homework and to do it better.’” (Cindy Mels, of Delhi P.S. student, 2001)
- “I perceived portfolios less as extra work and more like a huge puzzle. The challenge was to fit the pieces together to make a workable whole, whereby students build on previous success...” (Lyn-Anne Nash-Dertinger, Delhi P.S., 2001)
- “I am proud of this portfolio item because I have mostly correct spelling, I can complete work all by myself, next time I will correct punctuation” (Kristy, Grade 2, Delhi P.S., 2001)

- "Parental involvement in this process is essential in order to improve student learning. A parent's signature in a student's journal does not equate with parental involvement...taking the time to read their student's journal and to comment on their plans for improvement shows a commitment towards their child's learning." (Todd Bannister, Banbury Community P.S., 2001)

Action Research Summaries:

- A. Susan MacNeil, Onondaga Brant P.S. - Principal
Brenda Hunt, Woodman Cainsville P.S.- Principal
Janet Rubas, TRC - Teacher Consultant

Using EQAO to Inform Assessment Practice in the School

Focus:

How can schools use the EQAO process and the EQAO results to help in the development assessment skills?

Process:

Rationale

- *It is essential for both school staff and parents to recognize that the EQAO assessment is an integral component of program.*
- *Information provided from EQAO data is a foundation for consistent, precise plan assessment.*
- *The EQAO assessment models both the process and product of a program that fosters high thinking skills, effective communication skills, and meaningful process writing.*

- A. Cont'd

Steps

- *All staff participated in in-service sessions and professional reading on the principles of assessment.*
- *Working sessions examined the content of EQAO assessments.*
- *Focus on building understanding of what reasoning "looked like" in the assessment through anchor booklets: What questions were asked? What was a demonstration of level reasoning?*
- *Working sessions examined schools' EQAO assessment results not only with staff but with School Council.*
- *Focus on analyzing data to determine schools' strengths, weaknesses and surprises.*
- *Planning of Parent Symposium to build parental understanding of assessment practices in school and in the home.*
- *Incorporation of analysis of results into classroom programming and assessment.*

Findings:

- As all staff became more familiar with the content and results of EQAO assessments attitudes toward the process lessened and teachers began to use the information more positively in program planning.
 - The clear examples of what tasks would look like when related to achievement level categories are the questions in the EQAO tests, provide a teacher with models that are being used in programming.
 - With clear examples teachers were more able to track students' work within categories.
 - Further work must be done on finding ways to get parents more involved in understanding assessment practices.
 - Although the Parent Symposium, which was suggested by School Council, was planned for Parents on May 12, 2001, it needed to be cancelled due to lack of registrations. Although 400 flyers were distributed for 6 different workshops, only 7 parents registered for the session.
-

B. Cindy Mels, Delhi Public School - K-3**Portfolios****Focus:**

How do I use portfolios to improve and motivate student learning?

Process:**Rationale**

- *I had tried portfolios before and saw potential for self-assessment and empowerment.*
-

B. Cont'd**Steps**

- I used portfolios with students to improve on their responsibility to choose and reflect on the quality of work.
- *Flexibility is necessary and it was logical to use conferencing with parents as 'closure'.*

Findings:

- *I used a "Portfolio Window" for display and explanation of choice followed.*
 - *Increased motivation and improvement occurred.*
 - *Gradually more efficient in time and process.*
 - *Multi-intelligence opportunities increase empowerment and ownership.*
-

C. **Lyn-Anne Nash-Dertinger, Delhi Public School - Grade 2**

Portfolios

Focus:

How can I help students develop the learning skills necessary to become life-long learners and in the process, meet the goals in the knowledge and skills areas of the Ontario Curriculum?

Process:

Rationale

- Student involvement with respect to goal setting and student ownership of the portfolio was
- Assessment for learning is process oriented, needs dialogue and focus on improvement.

Steps

- I used a fat file for a writing portfolio, frequent student reflections of writing and a comment
- Students selected a writing sample each term for a final four-piece growth portfolio.
- Students developed a rubric for self-assessment and goal-setting.

Findings:

- Students improved in writing if it followed a multiple intelligence experience such as a drama, a reading or a field trip.
 - The guidelines of a rubric help to make reflections and goals more specific.
 - Portfolios incorporate curriculum expectations and promote life-long learning.
-

D. **Lesley Boudreault, Banbury Heights Public School - Grade 6**

Student Led Conferencing

Focus:

How can I improve my practice to increase parental involvement and facilitate student communication about learning?

Process:

Rationale:

- EQAO assessment showed there was not enough parental involvement in learning.
- We needed to supplement classroom practice with strategies to improve parental involvement.
- I wanted to use student led conferencing as the tool to increase the involvement.

Steps:

- Students practiced developing strengths, weaknesses.
 - Friday Quiz
-

-
- Student generated “This Week in Grade 6” newsletter.
 - Newsletters returned with parent response.
 - Students directed conversation in parent interviews in December.
 - Students took more initiative and newsletters became more flexible.
 - Students and parents surveyed.

Findings:

- Poorest efforts of students came from students where there was no parental feedback.
 - Regular parental encouragement translated into superior student responses.
 - 80% of students were able to direct discussion at parent interviews.
 - Newsletters resulted in fewer incomplete homework assignments, more student and parent comments on newsletters and interviews, and fewer calls from parents about assignments.
 - Written responses were clearer, more specific and have resulted in increased achievement.
 - Parents need activity sheets or suggestions for working at home with their children.
-

E. Todd Bannister, Banbury Heights Public School - Grade 6

Student Led Conferencing

Focus:

Will using Friday Response Journals and three way conferencing create a strong comr partnership between student, parent and teacher that will help improve student learning?

E. Cont'd

Process:

Rationale:

- Information in school newsletter was not getting to parents.
- I wanted to create newsletter interest by focussing on student achievement.

Steps:

- Students identify strengths, weakness and goals.
- Students write in Friday response journals.
- Parents comment and sign journals.
- Three-way student led interviews conducted.
- Students surveyed.

Findings:

- Friday Response Journals and three-way conferencing increased communication between child regarding school events and student learning.
- Students realized how important identifying weaknesses and creating action plans are to improve learning.
- Most students were able to provide examples of when they used the Friday Response Journal to help them improve one of their academic weaknesses.
- There were mixed results when students were asked if they liked the Friday Response Journal. Some students did not like the process because their parents were more interested in the events happening at school and their academic progress.
- 20 of 24 students consistently returned their journals, each week and average of 5 paragraphs of comments in the journal.

F. Deb Kekewich, Cedarland Public School - Grade 7

Student Led Conferencing

Focus:

How can I improve my practice to help my students think and talk about themselves as learners?

(13 boys/14 girls)

Process:

Rationale:

- I saw the process in Australia and wanted to duplicate it.
- I wanted to improve learning in EQAO areas of weakness on the Grade 6 test, specifically explaining work and problem solving.

F. Cont'd

Steps:

- I worked on reasoning skills using a 'Friday Journal' as a learning log.
- I used the portfolio to evaluate growth.
- I used the three-way conferencing strategy with parent/student/teacher.

Findings:

- Reflective practice, portfolios, and three-way conferencing are all effective techniques.
- The journal/portfolio/student-led conference process helped to involve parents.
- The parents must support what is happening in the classroom and be wholeheartedly involved in their child's learning.
- Communication about school between parent and student increased. Seven of twelve respondents said the change was *dramatic*.
- *Twenty* students improved in their March report card marks and *twenty-three* students thought they were better students than a year ago.

G. Anita Ricker, Northview-Parkview Public Schools - Grade 1

Portfolios

Focus:

To demonstrate the authenticity of the drawing portfolio as a formative assessment tool.

Process:

Rationale:

- *I wanted to use portfolio to show the importance of 'listening' to students' learning and do as a Reggio Emilia Approach to Early Childhood Education and to use the portfolio drawing as a vehicle for learning.*

Steps:

- *I used 'drawing what you see' (initial phase, construction phase, refinement phase) and did assessment in Autumn Harvest, Inukshuks, Snowflakes, and Postage Stamps.*
- *I used visual display of progressive work.*

Findings:

- *The drawing 'growth' portfolios showed solid evidence of student learning over time.*
- *The reflective process transformed a collection of learning samples into a meaningful individual learning.*
- *Children do draw to learn and can demonstrate learning through drawing.*

H. Joanna Finch, Banbury Heights Public School - Grade 6

EQAO Results

Focus:

How am I going to be able to help my students better communicate their problem-solving ideas?

Process:**Rationale:**

- I needed to improve EQAO provincial test results.
- I needed to assist students in communicating reasoning and communication skills in problem solving.

Steps:

- I developed "Problem of the Week".
- I used scaffolding, corrective feedback and small group conferencing to self assess.
- I used journal writing for corrective feedback and reflection.
- I developed Pythagoras Math Club.

Findings:

- Corrective feedback helped students to identify strengths and weaknesses in problem solving.
 - Conferencing helped students develop reasoning skills.
 - 15 of 23 students were confident enough to join the extracurricular math club.
 - 21 of 23 students believe they are better problem solvers than they were at the beginning of the year.
 - Having a critical friend and extra eyes in the classroom helped me document what was happening in the classroom.
-

I. **Sue Young, Banbury Heights Public School - Grade 7**

EQAO Results**Focus:**

How can I improve student initiative and independent learning skills?

Process:**Rationale:**

- I needed to improve EQAO test results by improving student achievement.
 - I needed to assist students in taking initiative for improving their own learning.
-

I. Cont'd

Steps:

- Teaching students how to structure questions so they could get help with what they did not understand.
-

- “Experiment test” in math as a corrective feedback strategy.
- Opportunities for corrective feedback in the monthly D.E.A.R reading assignment.
- Establishing “the table” that students could use for getting help, once they had a specific question.
- Teaching students to predict and write their own report card.
- *Self-Assessment/Conference form for setting learning goals.*

Findings:

- Asking for help, coming in for extra help and handing work in early had the greatest student achievement.
- Being “important enough” to contribute ideas to their own education improved student achievement.
- 72% of students reached their first term goals, 80% thought goal setting helped achievement and 82% thought goal setting improved their grade 7 year.
- 78% of students felt that working on the third page of the report card through the Self-Assessment/Conference Form improved their commitment to improving their learning.
- Participating in Action Research improved my motivation to reach goals and track results.

J. Neal Stamer, Pauline Johnson C. & V.S./Brantford Collegiate Inst. & V.S. - Grade 10

Portfolios

Focus:

Will the Learning Portfolio as assessment strategy help to improve student motivation to learning?

Process:

- Given all the changes in secondary reform, would the portfolio help with student motivation subject of History?
- Students will feel empowered and more committed with the best-work portfolio.
- Are performing better and student motivation variations on the same theme?

J. Cont'd

Steps:

- Documented several indicators (attendance, surveys, witnesses, and professional judgment) Grade 10 Applied and Academic focus on World War II.
- Used ‘holding tank’ portfolio and ‘selective’ for eight best samples using a reflection sheet questions.

-
- Corrective feedback and sub tasks to refine the process.

Findings:

- With chosen 'wow' questions (students' questions used for discussion) from the reflection author/student (anonymously) was pleased and more engaged and the quality of 'wow' improved.
 - A reflection/selection period every week or so works best because it takes time to famili portfolios.
 - Ownership and choice of assessment promotes motivation; diversity of opportunity is key.
-

K. Carolyn MacNeil, Delhi District Secondary School - Grade 10**Portfolios****Focus:**

How can I use the portfolio to improve my assessment practice in corrective feedback and student accuracy in self-assessment?

Process:**Rationale:**

- *Students were too mark conscious.*
- *Students were not incorporating 'next step' comments into revision.*
- *Students did not seem to have realistic self-assessment skills.*

Steps:

- *Allowed students opportunities to 'act, reflect, revise' so that could improve upon their learn from mistakes.*
- *Developed an exemplar and rubric so that criteria of levels were communicated.*
- *Allowed varied experiences for portfolio in multiple intelligences.*

Findings:

- Reflection is important for students to self-assess and get a clear picture for improvement.
 - The Portfolio allows the opportunity for dialogue and coaching which is so important for feedback and improved student articulation.
 - *The Portfolio as a summative evaluation is a powerful tool*
-

3. GUIDELINES FOR PRACTITIONER RESEARCH

GRAND ERIE DISTRICT SCHOOL BOARD

J. DeLong, Superintendent of Schools

Guidelines for Practitioner Research Funding

Background

Quality educators have always been involved in reflective practice as a professional activity. Grand Erie District School Board would like to support and extend that effort by offering research opportunities.

Expectations

- 1.0 Research must be conducted by the teacher/administrator on his/her school or classroom for the purpose of improving student learning.
- 2.0 The research must be conducted in a professional and ethical fashion:
 - teachers have the right to investigate their practice; however, publication requires permission or anonymizing of names
- 3.0 Research must be conducted:
 - by an individual or group
 - informally or for credit (Master's Program)
- 4.0 The research should be a one-year project, connect to the areas of emphasis and may connect to other initiatives, such as:
 - Educational Change Funds
 - Leadership Programs such as L2K
 - Action Research Projects
 - Project Management
- 5.0 The participant(s) must be able and willing to conduct research that includes the following:
 - focuses on a clear question that will improve student learning
 - involves careful data collection that may be qualitative and/or quantitative
 - develops findings based on analysis of data
 - shares the results and reports in writingFor example, a research question could address:
 - creating a whole school approach to EQAO testing

- improving problem solving in Mathematics
- using articulation as an indicator of reasoning

6.0 Participants must submit a written report before the end of May to the superintendent responsible.

7.0 The participant(s) must be willing to share their research project. This may include:

- conferences
- websites (O.A.R.)
- network groups (Brant, Cayuga and Simcoe Action Research Networks)
- school and area professional development
- First Class "chat" groups

D. PERFORMANCE REVIEWS AND EVALUATION

1. Annual Performance Review: 1999

Jacqueline D. Delong

Delhi/Simcoe/Valley Heights/GELA Family & Assessment and Career Education

1.0 Introduction

Jackie, your Family of Schools and System responsibilities have changed this year. A new Family and Area created the challenges around establishing contact and credibility. Your system responsibilities were extensions of areas in which you had been successful previously. In some cases, like assessment and leadership development, they were large extensions. You have risen to the challenge. It has been a challenging and tiring year. We can, however, reflect on considerable progress in a lot of different areas.

2.0 Family of Schools

Your Family of Schools has been a completely new area. The geography, the people and the culture are different from those that you supervised previously. You have made a Herculean effort to be visible and active in the Family. This has involved a lot of driving and a lot of extra hours.

The group of principals and vice principals is quite inexperienced. Only a few of the principals have more than two years experience in the role. Seven of your principals and three of your vice-principals are in their first year. The previous culture operated with little systematic structure. Planning, at the school level was informal. Performance review expectations were vague. As a staff developer, you

have provided leadership for the role and for getting to know the new culture of Grand Erie.

Your Family of Schools meetings include a strong emphasis on professional development. You have involved the principals in running the meetings and in providing feedback to you about the meetings and about the impact you are having on the Family.

As a result of the inexperience of your administrators and the culture changes, you have had to deal with a number of issues.

Valley Heights' principal operates very informally and has made mistakes with the circulation of student information. The lack of a requirement to live within resources and plan for their effective use has allowed the controversy over the Educational Assistant for the Resource Withdrawal Room to continue without progress toward an effective solution. Expectations for school level problem solving may need to be confirmed in writing.

**Note I removed some names here.*

The establishment of the **Simcoe School Support Centre** has been a major project, in which you have taken the lead role. The Grand Erie Model was a significant change for everyone in the area. Former leaders were still around, supporting the previous practices. Karen Anderson and Mary Lou Bousefield have helped you implement the new model and changes in the support staff will further support the new model. The former leaders have, for the most part, moved on. I believe the Simcoe Support Centre is positioned to support your Family well for next year. It will experience more difficulty servicing Colin's Family, simply because of the distances.

The **Ad Hoc School Accommodation/Consolidation Committee** took a lot of work and time. You and Gerry had a difficult role to play. While the results are not definitive, I think we have raised the level of understanding that the problem of small secondary schools is going to get worse in the area. Your leadership helped keep the committee on task and timeline.

3.0 System Responsibilities

The crisis in leadership appeared suddenly, with the introduction of the 85 factor for the Teacher Pension Plan. The entire province experienced a dramatic change in their school administration and a lack of qualified candidates. Professional development has always been one of your strengths. You threw yourself into this challenge and I think the results have been extraordinary.

With Administrative Council you helped to develop the *Criteria for School Administrators*. This identifies the major key result areas for leaders and leadership

development. Five levels of training and development for School Administrators have been supported.

The **Recruitment Group** is ready to talk to teachers about school administration to build the cadre of people who may be interested in pursuing the role in the future. This is a key group and the results will be long term ones.

Building Leadership Capacity is a program designed to help people obtain the qualifications for school administration. The establishment of a Master of Education program, delivered locally in partnership with Brock, is a wonderful support for these people. The creation of a Principal's Qualification program, with a local module, is another support for these people who are 2 to 5 years away from the role.

The **School Leadership Program** will help with the final preparation for applicants for the role. Again, the local Principal's course will assist. The module that is offered locally will deal with Grand Erie systems and practices. The need for duplicate modules will be reduced and the efficiency of the preparation enhanced. One important outcome of this year's School Leadership program has been the development of **rubrics** for the Criteria for School Administrators.

The **New Administrators' Group** is a peer support group. It deals with the practicalities and the affective pressures of being a new administrator in Grand Erie. This type of flexible, timely in-service and support is invaluable. The challenge will be to ensure vitality, consistency and growth in this type of group. The quality of the in-service does depend on the membership at any meeting.

In-service for practising school administrators will likely remain a joint venture with Executive Council. An Advisory Group will be useful to identify Administrator needs and desires and Administrative Council will identify needs. I hope we will be able to plan the dates for whole group meetings, set up a schedule for a variety of smaller group offerings and build toward the Administrators' Conference as a culmination of some of the thrusts for the year.

All leadership development programs will need to remain flexible. Too much personal ownership for a program tends to restrict enrolment over time. We need to launch all the programs but the themes and the leaders need to be scheduled for change right from the outset. A variety of types of people and training routes are desirable for a system this large. Reflective practice should be a part of the training for most administrators. If, however, Action Research or Covey, or any other approach is perceived to be a requirement for all Grand Erie leadership training, we will exclude some good, potential administrators. Flexibility, availability, variety, efficiency and relevance are important factors in vibrant programs that will produce a constant flow of qualified administrators.

Congratulations on pulling together an effective Leadership continuum in a short period of time. You have involved a lot of administrators in the planning and delivery of the programs and have put us in good shape for the short term and the longer term. More people are seeing that the support is available locally.

The **Assessment portfolio** has taken on enhanced prominence. The EQAO testing is now established in Ontario and is being used for many valid, and some less valid, purposes. Diane Morgan has continued to provide system leadership in this area and will be missed when she retires this year.

A **Green Paper on Assessment** has been produced and circulated. It provides a basis for decision making in the area of assessment and provides some direction for in-service and growth.

Early and On-going Identification procedures have been reviewed and Grand Erie procedures developed for the in-coming Kindergarten classes. Collection of a fairly standard body of data on each child is potentially very important for the educational programming of each child. The Early part of the data collection is probably the easiest. Ensuring that the data is maintained and used for programming throughout the child's early years is a larger challenge.

The **Grade Three Action Plans** were completed and included on the EQAO Website as an exemplar. The Board was informed of school plans. Grade Six testing occurred for the first time this year, requiring in-service for another group of teachers and orientation for the students. The 1999 results will be the first real indicator of the success of our interventions. Can we make a difference in test achievement?

The development of teacher skills has focussed on **rubrics**. Teachers are becoming comfortable using rubrics and are developing skills in writing them. These skills will improve assessment and evaluation. Next year you want to do more work in portfolio assessment.

The new **Provincial Report Card** provided every school and Information Technology with significant challenges. Working through the challenged has provided opportunities for the development of assessment skills. The work that curriculum and assessment have done on the development and use of rubrics is enhancing the assessment practices.

Parental Involvement continues as a strength in most of schools. The **Green Paper** outlines the types and levels of involvement without being prescriptive. It values all types of parental involvement equally.

Schools Councils are searching for their role. You have provided liaison and in-service opportunities. The previous levels of involvement with the Board and in School decisions varied. Therefore there has been some conflict when School Councils appear to have less influence than they previously had. The need to discuss the liaison connection between School Councils and the Board remains. You have reminded me of this need. The Board will have to address the issue in the near future. Your **School Council Implementation Team** has done a good job. You have recognized the need to revamp and renew this committee for next year.

Each School Council has prepared its **criteria for a change in principals**. Given the number of changes we experienced this year, it is important that we repeat this task early in the mandate of each new School Council.

Partnerships continue to be a productive emphasis. Your relationship with the skilled trades organization has produced a better understanding and has opened the door to some potential sharing of resources. **Take-a-Kid-to-Work, Work Experience, Cooperative Education, the Ontario Youth Apprenticeship Program** and the **Career Resource Centres** are all good examples of partnerships with the business and industrial sectors, where we need to continue to build the connections

Career Education has come along nicely. The programs above are continuing. OYAP is trying to expand into other parts of the Board. The Career Resource Centres are a significant achievement. In cooperation with Human Resources Development Canada, Fanshawe College and the St. Leonard's Society, the Grand Erie District School Board has been able to establish five Career Resource Centres in secondary schools. The goal is to have a Career Resource Centre in every secondary school. Recently the Catholic District School Board has joined the partnership.

Alternative learning opportunities have undergone some changes this year. The principal changed in mid-year. The General Interest Courses expanded to Simcoe. The Alternative program is set to expand to Simcoe and Cayuga, if enrolments are sufficient. Elementary Alternative Programs are getting started, in forms other than SALEP. This Alternative Program will be offered to all areas. Other options may be desirable.

Summer school is organized and the introduction of the mandatory elementary summer school has led to expanded offerings. We will need to track the costs, especially for transportation.

4.0 Leadership Style

Jackie, you have a very professional approach to your work. You think in theories, models and system and you reflect on your practice. You actively seek feedback from your principals. This is very important. Your professionalism can intimidate others. You have the knowledge, position and bearing that gives you an upper hand in most interactions.

Many of our teachers and other staff do not have the type of mind or the knowledge you have and some find it intimidating. You do need to keep this in mind because there are occasions when it interferes with communication.

You have made a good effort to follow-up on the feedback from your last performance review. Gauging the impact we have on others is difficult because so many people will tell us what they think we want to hear. The feedback from your principals was a good idea and you certainly reflected on it.

The same components of your style that intimidate some people also contribute to your effectiveness. Your vision, planning, enthusiasm and goal-orientation are key ingredients that allow you to accomplish as much as you do.

5.0 Relationship with Board and Trustees

Your relationship with the Board continues to be one of respect and confidence. The one incident over differing expectations with regard to the Grade Three Test Results was a source of potential conflict, but it passed quickly.

You have two trustees in your area who are used to being involved in day-to-day issues in schools. Your relationship now appears to be solid, in that you are talking with them more regularly about the issues and assuring them that the issues are being handled. This relationship took a bit longer to develop because you were so busy and because your professional bearing kept them at a distance. Now that they know they can approach you, you may find they will require more time. This is probably a good investment. If they are more knowledgeable, we may be able to counteract some of the rumours.

You are pursuing with your schools the proper manner to address concerns. We will need to work with these trustees to ensure that it does not get translated as an effort to keep the trustees in the dark.

6.0 Contributions to Administrative Leadership Team

It has been a productive year for the Administrative Team. We have accomplished a lot. One of the things we have not accomplished is the development of the type of relationship we need to sustain ourselves at Administrative Council. Your area and

role have removed you from the group on a more frequent basis. You found this very difficult. However, as the frustrations within the group rose, you also found that this provided you with an excuse to escape. This was probably a positive move to avoid conflict (Going to the balcony.)

*Note, I removed some names here.

Your relationship with the others seems to be based on mutual respect. They know your goals are good for kids. Sometimes you need to take a bit more time for explanation and dialogue with your peers. Help them to understand that you feel the same way about their goals.

Priorities for 1999-2000

- 7.1 Develop assessment skills among teachers through rubrics, portfolio assessment and analysis of standardized test results.**
- 7.2 Add Career Resource Centres at X**
- 7.3 Consolidate the Leadership Development program and develop a one-year overview for current administrator in-service.**
- 7.4 Orient and develop a goal package for the new Program Coordinator – Assessment and Career Education.**
- 7.5 Work with Board and School Councils to develop a liaison mechanism.**
- 7.6 Ensure effective School Growth Plans for each school in the Family.**
- 7.7 Applications and reports to obtain funding for Rural Coop and for OYAP programs.**
- 7.8 Conduct research on increasing the attainment of expectations by teaching teachers to use testing data and new strategies.**
- 7.9 Continue to build a team in the Simcoe School Support Centre.**
- 7.10 Conduct Ad Hoc Study in Town of Simcoe (Elementary)**

Summary

Jackie, thank you for accepting and meeting the challenges of your new portfolio. You have dealt with a huge amount of change and you have effected great changes. It has come at a cost to you in terms of time and energy. I am hopeful that the work we have done this year will allow us to set clearer common goals for 1999-2000 and recapture more of the enjoyment of the job.

Your Family of Schools is becoming your Family of Schools. The community is being drawn into the educational enterprise in an ever-increasing number of ways. Teachers and programs are becoming more accountable for student achievement. Career education is more firmly embedded in programs. Despite cutbacks and obstacles, we are continuing to expand the number of alternatives available to students. Reflect with pride on what you have helped to create.

June 21, 1999

2. GOAL PACKAGE AND PERFORMANCE REVIEW, 2000-2001

Jacqueline D. Delong

Superintendent of Schools

Assessment/Community Relations/Career Development/Communications

Goal Package –2000-2001

Guiding Principles

1. Keep the focus on the learner
2. Build relationships to improve student learning
3. Communicate effectively
4. Create a culture of care, involvement, inquiry and reflection
5. Be a strong contributor to the administrative/trustee team
6. Make effective, efficient use of resources
7. Reflect and model values of the community
8. Plan for student and staff growth and improvement
9. Respect tradition and respond responsibly to change

10. Model and develop leadership capacity
11. Be principle-centred
12. Improve my practice through action research

Community Relations

1. Complete partnership with Brantford Public Library to provide professional library
2. Continue partnerships with BSDG, HRDC, H-N Manufacturers
3. Continue community involvement on BGH Board

Career Education

1. Complete implementation of Career Resource Centres in all regular secondary schools
2. Support and extend career education programs including implementation of "Choices into Action"
3. Support committee to find a model for magnet programs

Staff Development

1. Support school-based research; continue editorship of OAR; support OERC/ARR Conference
2. Support Action Research networks
3. Support Project Management – Brochure on GEDSB Action Research
4. Create green paper on staff development
5. Refine corporate staff development plan
6. Provide in-service for non-union, clerical-technical and New Teacher Group
7. Supervise Training and Development Officer

Leadership

1. Support leadership programs: GrEAT, GrEAT Conference, L2K, New Principals/Vice-Principals Group

2. Support Master of Education program; plan for new cohort Sept 2001
3. Develop Career Planning/Mentorship program in L2K
4. Develop tools for New Administrators - Handbook
5. Present leadership green paper for development into policy

Assessment/Testing

1. Analyse results, write report, share local results and write and share board action plan of Grade 3 and 6 Provincial Test Results; Implement and review plan; support school action plan development
2. Preparation for, conduct and review Grade 10 Reading and Writing Test
3. Conduct action research projects on strategies to improve results, student-led conferences and student portfolios
4. Fine tune secondary electronic report card
5. Expand repertoire of assessment strategies: implement use of portfolio assessment and student-led conferences
6. Review and refine Early and On-going ID Procedures
7. Support Project Management – Guideline For Analyzing and Using EQAO Test Results To Improve Student Learning
8. Supervise Program Coordinator Assessment and Accountability

Communications

1. Work in partnership with JAN Marketing to develop and implement a strategic plan
2. Provide communications workshops to administrators, trustees, teacher and support staff groups
3. Listen to and consult with internal and external groups to assess areas of strength and weakness in communications
4. Increase system use of technology for communications esp. web-site
5. Support Editorial Board for GEDSB Newsletter and Cable TV Program
6. Support Project Management – Communications Research.

Family of Schools

1. Continue to build relationships with principals and communities

2. Build skills of principals and vice-principals in planning, curriculum and assessment, supervision and discipline, integration of computers and inquiry and reflective practice
3. Complete four PPR using action research process
4. Support Simcoe Composite
5. Integrate Sprucedale into the District
6. Complete Simcoe elementary consolidation/accommodation study
7. Support Transition Team
8. Review and modify FOS meetings to meet expectations of group
9. Supervise Simcoe School Support Office through Principal-Leader

Personal Professional Development

1. Complete writing Ph.D thesis
2. Present at AERA, ICTR, ARR/OERC
3. Find the meaning of "balance"

11/09/00/JDD

Grand Erie District School Board

Annual Performance Review: 2000

Jacqueline Delong

Delhi, Simcoe, Valley Heights, Sprucedale and GELA Family and Career Education, Assessment and Communications

7.0 Introduction

Jackie, once again your portfolio has changed during the year. Greg picked up School Councils and you assumed more responsibility for magnet programs and for the communications portfolio.

8.0 Family of Schools

Your Family of Schools has come together this year. Your leadership style was significantly different from the style the schools had experienced. Your emphasis on planning, research and involvement caught some principals off guard. In

addition, they had to get to know the person from "Brant". You were a bit discouraged one year ago about the degree of acceptance in your Family.

We agreed to give it another year. The results of your **principal survey** for 2000 indicate a high degree of acceptance for your directions and your leadership. You have involved a significant number of staff in action research.

Your Family of Schools meeting includes a **professional development** component designed to build the skills of principals and vice principals. You have focused on planning, curriculum, assessment, supervision, discipline, integration of computers and inquiry and reflective practice skills. With a large number of new principals and vice principals, the skill building will have to be continuous.

You have had three consolidation studies in the Area. The **Norfolk Secondary Study** was a necessary prelude. The **Valley Heights Study** produced some very workable results. You are currently involved in the **Simcoe Elementary Study**. The principals are taking a lead in this study and are looking at the longer-term implications of enrolment decline.

The **Grand Erie Learning Alternatives** has had a busy year. The expansion to sites in Simcoe and Cayuga has been accomplished. The Cayuga operation is providing its challenges. The threat of eviction from Market Square provided addition excitement. A lease extension has reduced the imminent move from that site.

You have reviewed the Family of School meeting agendas and have incorporated principal and vice principal input. Peter Rasokas replaced Karen Anderson as Principal-Leader in the Simcoe School Support Centre in December. Peter will set his own directions for the Family. The office is running more on the model we envisaged for the system. Your principals are having direct input into the teacher-consultants positions for the Family.

9.0 System Responsibilities

In the fall you were responsible for implementing the **School Council Steering Committee** to arrange in-service for School Councils. You started the examination of structure for School Council/Board Liaison. Greg will carry that one forward. School Council Family forums were encouraged and occurred in most Families.

The **Volunteer Development** plan is being implemented this year. The Safe Schools legislation may make it necessary to look at police screening for volunteers, in addition to employees.

You have continued to work toward a partnership with the Public Library to house and circulate a **professional library** collection. Details remain but progress has been made toward an agreement.

Career education continues to prosper under your leadership. A **Green Paper on Career Education** along with a report went to the Board in June 2000. Effective partnerships with Brant Skills development Group, Haldimand-Norfolk Manufacturer's Association and Human Resources Development Canada enrich career education in our schools. **Career Resource Centres** continue to be established in additional secondary schools. Once again you have secured funding to operate these centres for next year. The schedule for implementation of ***Choices into Action*** was included in the Career Education report.

Exploration of **magnet programming** for the District is an important part of an integrated career education program. Without Magnet programs we will be limited in the number of specialized courses we can offer. The obstacle of transportation must be measured against the program offerings, the efficient use of staff and facilities and the reduction in capital expenditures. The commitment of principals to the concept is a basic requirement. Planning is underway. Dialogue will need to continue through next year.

The **staff development** responsibilities are starting to sort themselves out. Dan has assumed more responsibility for curriculum in-service, including the Summer Institutes. Gerry and Bruce are providing computer in-service. Joe deals with plant and maintenance in-service. You are looking at Corporate Staff development from a system perspective. Maria has grown into the role of assisting and leading non-teaching development.

Your **Action Research** groups continue to grow. Four support groups now meet regularly within the region. Reports are being generated and shared. A significant number of Educational Change Fund requests are coming in from prospective researchers. The **Action Research Conference** was held in Brantford again this year, which allowed many of our staff to participate and present. You are also arranging for their involvement in the Act, Reflect, Revise Conference next December.

First-class conferences are being established for teachers and for interest groups within the system. This will allow more frequent and diverse contacts for all our teachers who wish to use it. Teachers have been provided with a **link to all additional qualification courses** through the Board Website.

In the area of **leadership development** you have performed some minor miracles. Despite a province-wide shortage of school administrators, we have generated enough candidates to replace the retirees. In 1999-2000 we were able to find 19 new principals and 14 new vice principals.

The **Masters of Education** program is preparing a future group. You are taking another shot at bringing a **Principals' Qualification Course** into the District. The **School Leadership Program** produced a pool of candidates and some useful leadership rubrics.

Building Leadership Capacity and the **New Administrators' Group** have provided support for newcomers. The **reception** organized in June brought out a large number of possible administrators for the future.

GrEAT had another successful year. The move to Camp trillium was well received. Sessions on Teacher Performance Reviews, Areas of Emphasis and Communication were conducted. The conference in April provided a focus for the area of emphasis on Building Positive Relationships.

With the other interest groups, you have developed a **Leadership In-service** program for the coming year. Hopefully the plan will clarify expectations and share responsibility and costs appropriately.

You should take considerable satisfaction in the leadership development aspect of your portfolio. Unfortunately, we cannot rest. The pool is shallow!

Assessment/Testing continue to become a bigger part of the Ontario Educational scene. You have produced Board Action Plans for Grade 3 and Grade 6 EQAO results. Each school has also produced plans. We are integrating these plans into the School Growth Plans. The focus on **promoting literacy** for the next three years is a direct signal of this emphasis. You have encouraged a number of research projects to investigate practices that will improve student results.

Secondary schools have spent time preparing for the **Grade Ten Test of Reading and Writing**.

Electronic Report Cards are in use in both elementary and secondary schools. The fall use of the secondary report was problematic but the winter usage went smoothly. Electronic reporting is well accepted in the elementary panel.

The **communications** portfolio is growing. You conducted the request for proposals for a marketing advisor. JAN Marketing was selected on a three-year contract. An environmental scan is underway. Four in-service sessions are scheduled for trustees, administration and school principals and vice principals.

10.0 Relationship with Board and Trustees

Your reports to the Board are well received. You are established as a leader. You work with a number of trustees on committees, as well as at the Board table.

We will still need to slow down at times to determine whether an action has political overtones. The trustees can be very jealous when we cross over into their territory. The political and values component of the job are still the legitimate domain of the trustees.

11.0 Contributions to Administrative Leadership Team

You are a leader on the Administrative Team, which is made up of leaders. As peers, supervisory officers have to respect each other for their contributions. On a few occasions this year you have lost patience with members of administrative council. Sometimes, by the conviction with which you state your views, you give the impression that you know better than they do. Sometimes this impression comes from the fact that they are not embracing your directions for change with the same enthusiasm that you do.

Regardless of your personal opinion of another superintendent, you cannot give the impression that you are evaluating their performance. I have to assume that responsibility alone.

Over the past five years I believe your leadership has deepened. It has become more firmly embedded in guiding principles and directions. Your passion for improving education has also grown. You are able to motivate a significant number of educators to examine their practice and consciously seek ways to improve. **This is powerful stuff!** You can create change opportunities.

By the same token, I believe you have become somewhat less accepting of those who do not choose to change. Your focus on task has remained strong. Sometimes people who do not jump on board feel they are neglected or ignored. Academically you are justified in expecting people to improve. In your current role, some people will simply choose to get off the train.

12.0 Priorities for 2000-2001

- 12.1 Develop a plan for Magnet Programming in the secondary schools of Grand Erie.**
- 12.2 Share leadership for the system emphasis on promoting literacy, through helping principals and teachers make effective use of the provincial test results.**
- 12.3 Ensure effective implementation of L2K programs.**
- 12.4 Complete an agreement to bring a Principals' Course into the area.**
- 12.5 Complete a Green Paper of Leadership.**
- 12.6 Implement in-service in connection with the Communications Plan.**
- 12.7 Arrange in-service to expand the range of assessment techniques, including portfolio assessment and conferencing.**

- 12.8 Encourage the growth of Co-operative Education, Work Experience, Job Shadowing and Ontario Youth Apprenticeship Programs.**
- 12.9 Provide leadership for the development of a corporate staff development plan.**
- 12.10 Others >>>>>**

13.0 Summary

Jackie, you make things happen! You are a change agent. Your capacity for work is prodigious. You have a profound influence on the people who enrol in your initiatives. Reflective practitioners, once established, will likely continue to be reflective for their entire lives.

You have made good progress with your Family of Schools and their communities. You continue to get a new supply of principals and vice principals who can benefit from your assistance and training.

At the system level you are providing effective leadership for a number of initiatives. Communication and Community Partnerships are essential for a public education system. Leadership development is perhaps the most crucial area of need.

Thank you for your dedication, hard work and initiative.

July 12th, 2000

Peter C. Moffatt
Director of Education
